Federal Procurement Data System(FPDS)

Reports

How to Use to Your Advantage

Version FY 2014.v1

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What is FPDS-NG?

- FPDS-NG is an automated system used to collect and report on federal procurement spending
- It is the single authoritative repository for federal procurement award data
- Data is submitted via a contract writing system (CWS) or directly into FPDS using Direct Web Input
- Direct Web Access - https://www.fpds.gov

FPDS-NG Vision

- Transparency and visibility into contracting
  - Contracting information is available across the federal spectrum down to the contract action
- Powerful business decision-making tool for the public and contracting communities
  - Anyone can view data and analyze trends
  - A Tool used for Market Research to find where is the market for a certain service or product
- Self-service, web accessible reporting tools
  - Used by the Public, government officials at all levels, IG & auditors, FOIA requests
  - Small Business Goals, Competition, Total Awards
  - Data is Available to the public within 90 days of award.
  - Data is Organized to Compare data from all federal departments.

Who Uses FPDS-NG?

- Designed for Use by:
  - All interested public parties such as the media, research groups, marketing groups, students, and commercial businesses
  - Contracting Officers
  - Program and Procurement Analysts
  - Senior Procurement Executives
  - Congress, state, and local governments
  - Procurement System Administrators

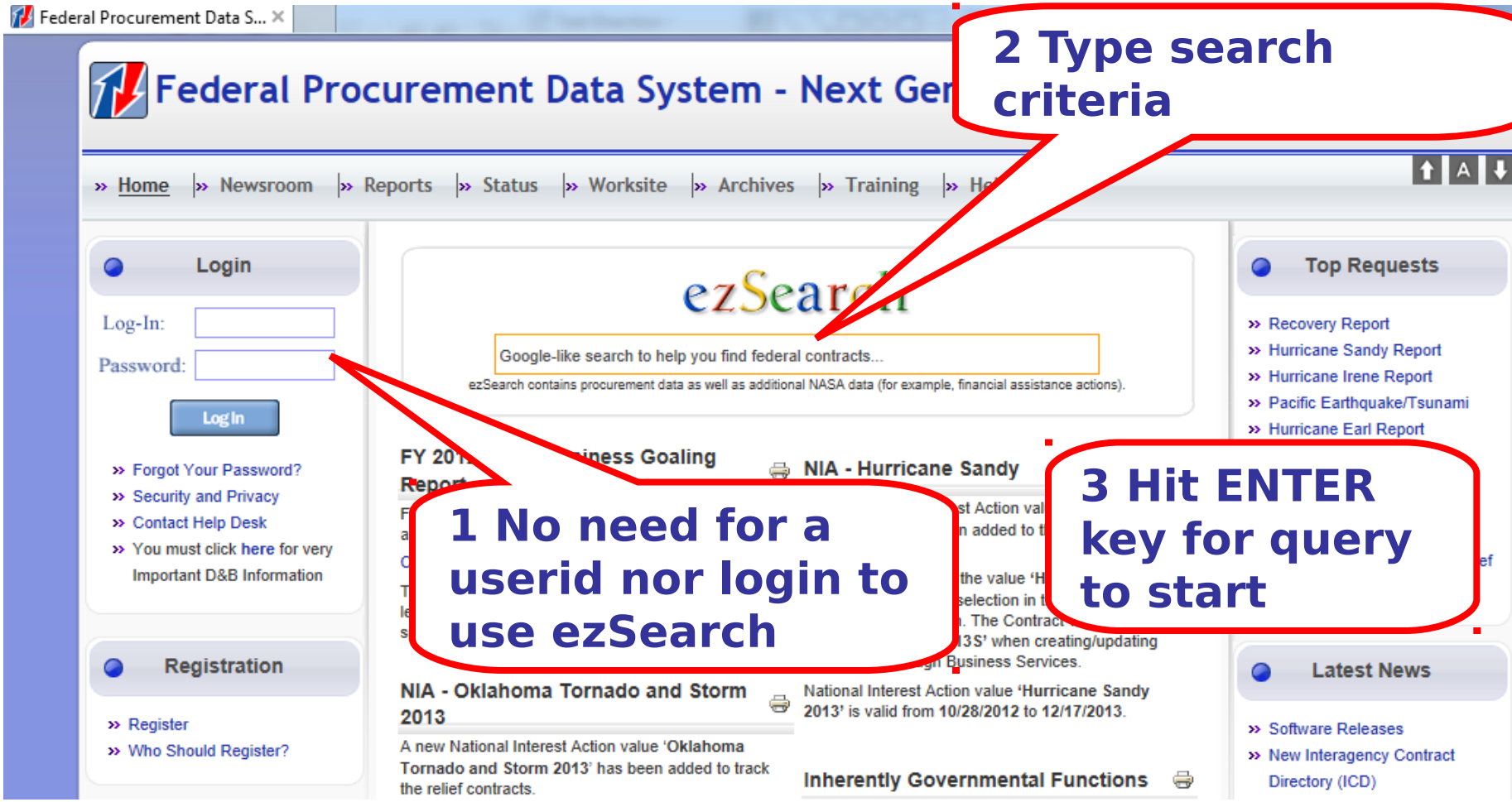
FPDS Userid for Reports Access

- Required
- Anyone Can Get a Public userid
  - Cannot see DOD data for the last 90 days
  - Some Reports are Government Access Only
  - Go to www.fpds.gov and Register
  - Public Userid Will Not be Made into a DOD Userid
- DOD Userid
  - Must Be Created by an Existing DOD User
  - Access to yesterday's DOD Reported Data
  - To Get a DOD Userid assigned
    - Contact Command, Service, or DOD System Admin

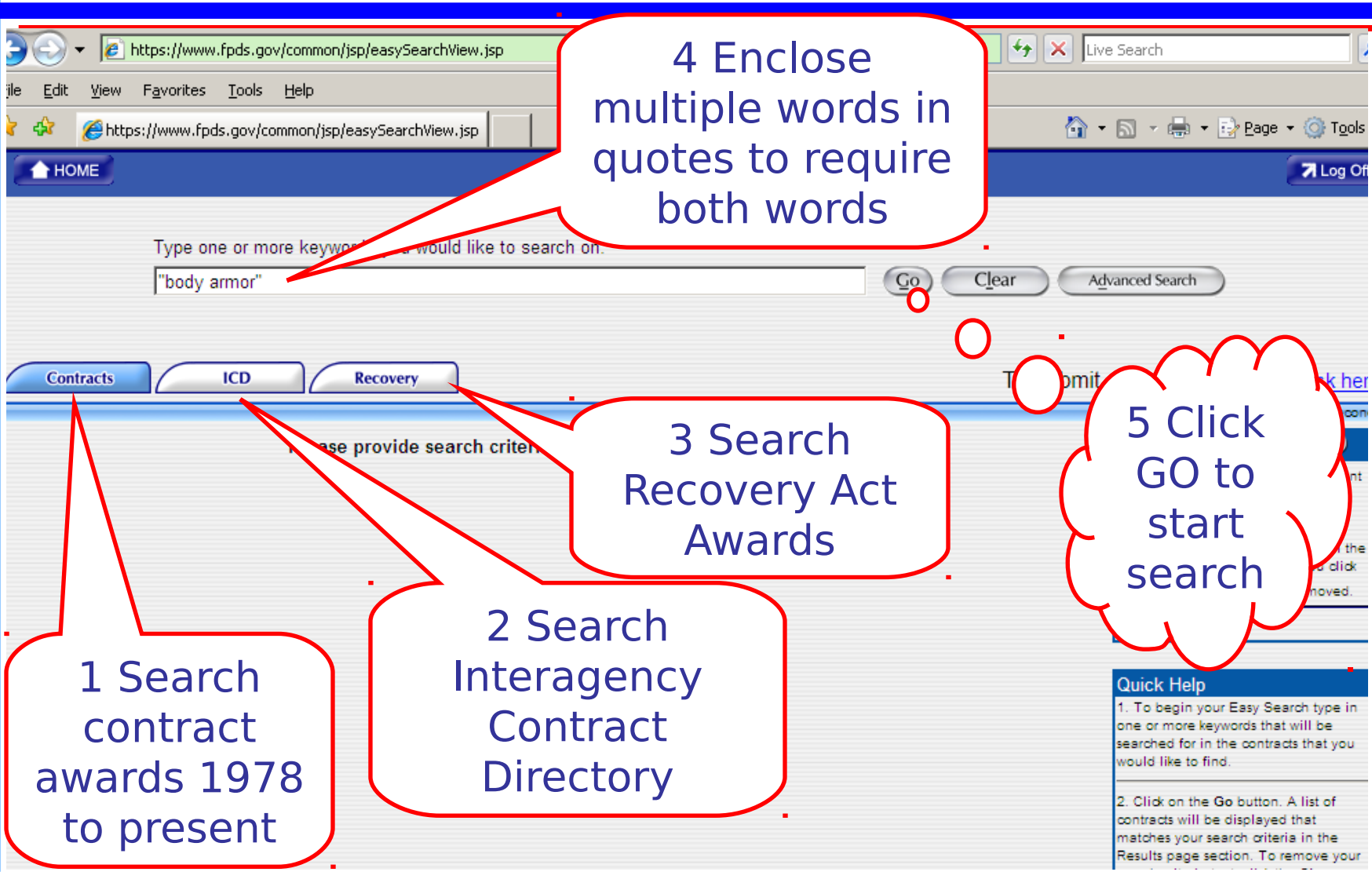
Three Report Avenues Available

- ezSEARCH
  - ‘google-like’ Search of Selection Criteria
  - Search Criteria is anywhere in the CAR
  - Output Can be Exported
- Standard Reports
  - Same Selection Criteria and Exclusions for Everyone
  - Drill Down to Award Detail
  - Drill to a Workflow Can Change the Report Format
- Ad Hoc Reports
  - Reuseable Report
  - Automatic Summarization
  - Must know FPDS fields and Relationship Between Fields
- Slides are a Guide for You to run Reports back in the office

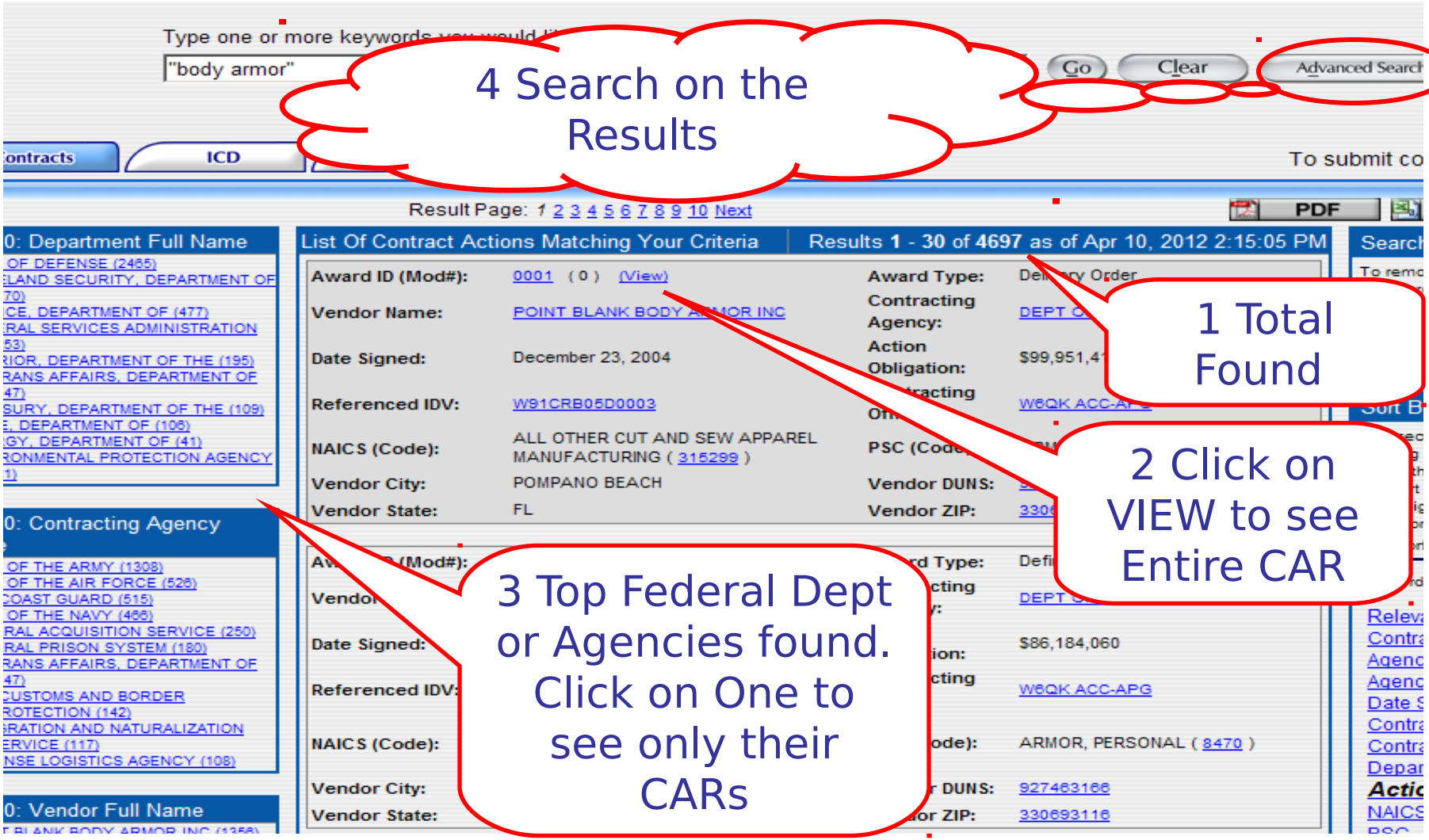
ezSearch Query – https://www.fpds.gov


Federal Procurement Data S...
Federal Procurement Data System - Next Ger
» Home
» Newsroom
» Reports
» Status
» Worksite
» Archives
» Training
Login
Log-In:
Password:
Log In
» Forgot Your Password?
» Security and Privacy
» Contact Help Desk
» You must click here for very Important D&B Information
Registration
» Register
» Who Should Register?
ezSearch
Google-like search to help you find federal contracts...
ezSearch contains procurement data as well as additional NASA data (for example, financial assistance actions).
NIA - Hurricane Sandy
NIA - Oklahoma Tornado and Storm 2013
A new National Interest Action value 'Oklahoma Tornado and Storm 2013' has been added to track the relief contracts.
National Interest Action value 'Hurricane Sandy 2013' is valid from 10/28/2012 to 12/17/2013.
Inherently Governmental Functions
Top Requests
» Recovery Report
» Hurricane Sandy Report
» Hurricane Irene Report
» Pacific Earthquake/Tsunami
» Hurricane Earl Report
Latest News
» Software Releases
» New Interagency Contract Directory (ICD)
2 Type search criteria
1 No need for a userid nor login to use ezSearch
3 Hit ENTER key for query to start

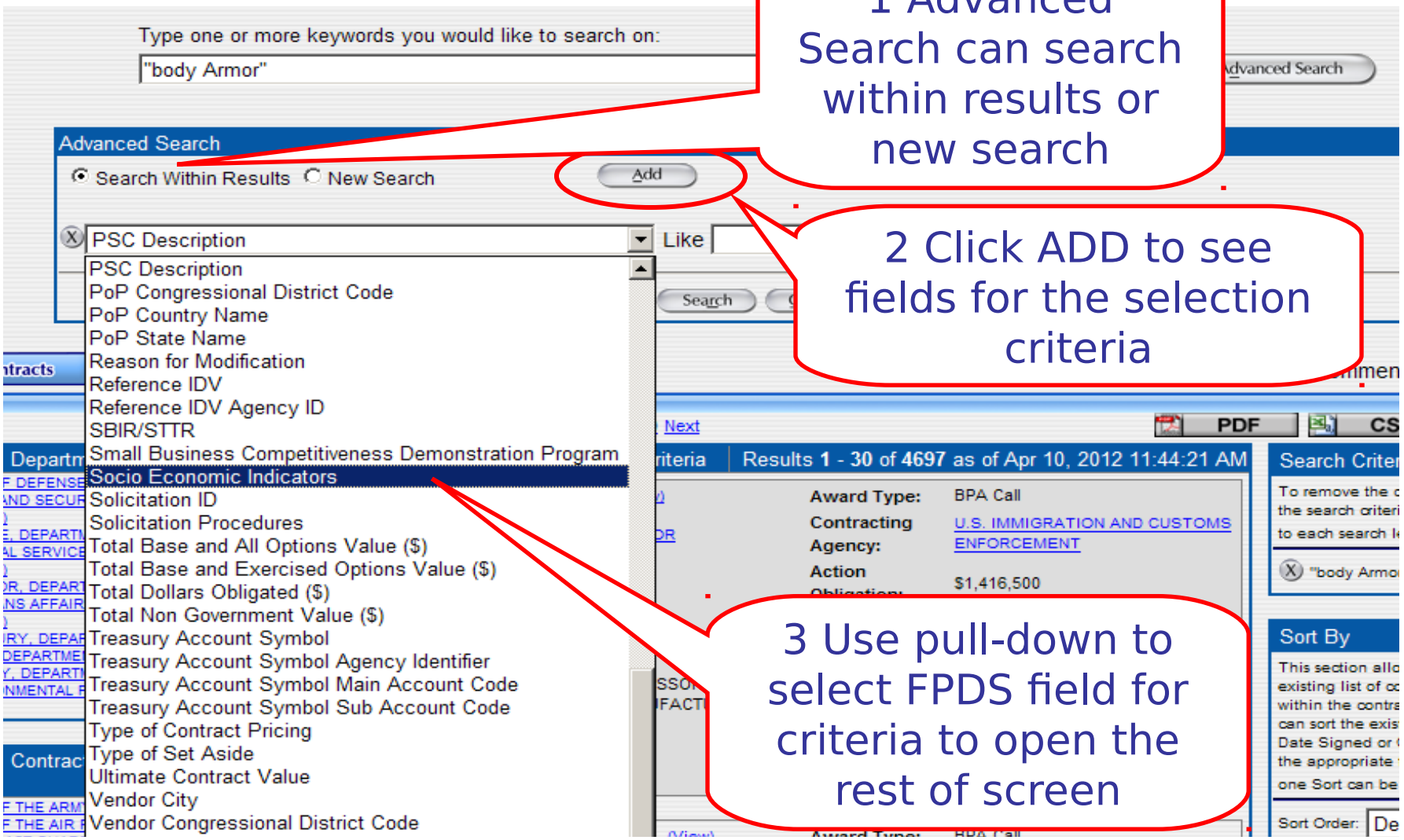
ezSEARCH Search


4 Enclose multiple words in quotes to require both words
"body armor"
Go
Clear
Advanced Search
Contracts
ICD
Recovery
3 Search Recovery Act Awards
5 Click GO to start search
1 Search contract awards 1978 to present
2 Search Interagency Contract Directory
Quick Help
1. To begin your Easy Search type in one or more keywords that will be searched for in the contracts that you would like to find.
2. Click on the Go button. A list of contracts will be displayed that matches your search criteria in the Results page section. To remove your

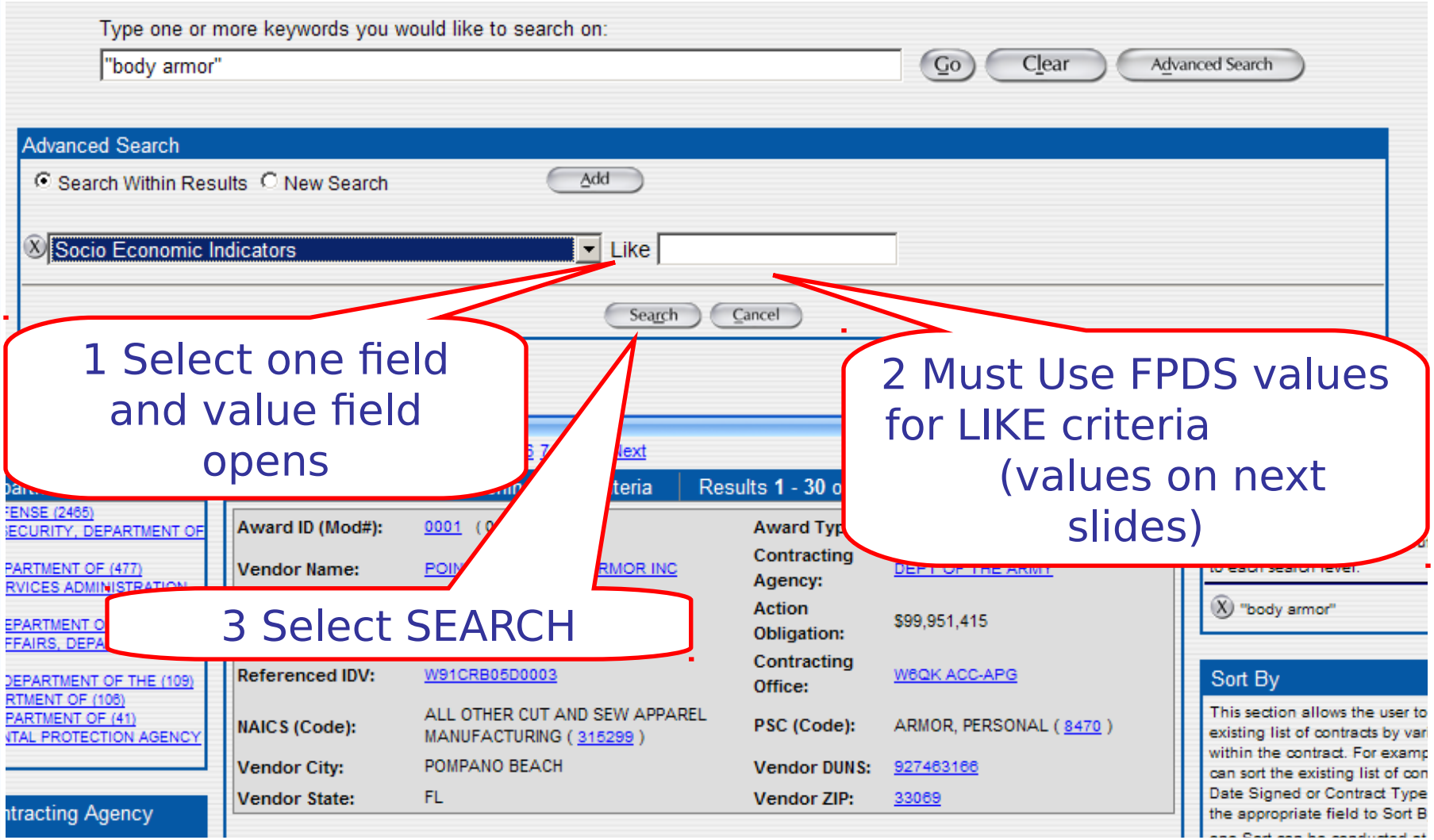
ezSEARCH Results



ezSEARCH Advanced SEARCH


Type one or more keywords you would like to search on:
"body Armor"
Advanced Search
Advanced Search
Search Within Results
New Search
Add
PSC Description
Like
Search
PSC Description
PoP Congressional District Code
PoP Country Name
PoP State Name
Reason for Modification
Reference IDV
Reference IDV Agency ID
SBIR/STTR
Small Business Competitiveness Demonstration Program
Socio Economic Indicators
Solicitation ID
Solicitation Procedures
Total Base and All Options Value ($)
Total Base and Exercised Options Value ($)
Total Dollars Obligated ($)
Total Non Government Value ($)
Treasury Account Symbol
Treasury Account Symbol Agency Identifier
Treasury Account Symbol Main Account Code
Treasury Account Symbol Sub Account Code
Type of Contract Pricing
Type of Set Aside
Ultimate Contract Value
Vendor City
Vendor Congressional District Code
Next
PDF
Results 1 - 30 of 4697 as of Apr 10, 2012 11:44:21 AM
Award Type: BPA Call
Contracting Agency: U.S. IMMIGRATION AND CUSTOMS ENFORCEMENT
Action $1,416,500
Search Criter
Sort By
Sort Order:
1 Advanced Search can search within results or new search
2 Click ADD to see fields for the selection criteria
3 Use pull-down to select FPDS field for criteria to open the rest of screen

ezSEARCH Advanced SEARCH



Keywords in Advanced Search Criteria (1/6)

- SEARCH KEYWORDS ARE NOW DOCUMENTED
- https://www.fpds.gov/wiki/index2.php/EzSearch_FAQ

- select AWARD TYPE like (| = or)
  - DCA | STAND ALONE CONTRACT
  - PO | PURCHASE ORDER
  - DO | DELIVERY ORDER
  - BPA | BPA CALL
  - BOA | BASIC ORDERING AGREEMENT
  - IDC | INDEFINITE DELIVERY CONTRACT
  - FSS | FEDERAL SUPPLY SCHEDULE
  - BPA | BLANKEY PURCHASE AGREEMENT
  - GWAC | GOVERNMENT WIDE ACQUISITIION CONTRACT

Keywords in Advanced Search Criteria (2/6)

- select LEGISLATIVE MANDATES like
  - CLINGER COHEN ACT COMPLIANCE
  - WALSH HEALEY ACT
  - SERVICE CONTRACT ACT
  - DAVIS BACON ACT

- To select ALL Awards to Small Business
  - Type - CO_BUS_SIZE_DETERMINATION:”S”
  - Click GO

Keywords in Advanced Search Criteria (3/6)

- select SOCIO ECONOMIC INDICATORS like (| = or)
  - SDB | SMALL DISADVANTAGED BUSINESS
  - 8A FIRM
  - FIRM8A JOINT VENTURE
  - WOMEN OWNED BUSINESS
  - VOB | VETERAN OWNED BUSINESS
  - SRDVOB | SERVICE DISABLED VETERAN OWNED
  - HUB ZONE | HUBZONE | HISTORICALLY UNDERUTILIZED BUSINESS
  - JWOD SHELTERED WORKSHOP
  - HBCU | HISTORICALLY BLACK COLLEGE UNIVERSITY
  - MINORITY INSTITUTION
  - EDUCATIONAL INSTITUTION

Keywords in Advanced Search Criteria (4/6)

- select SOCIO ECONOMIC INDICATORS like (| = or)
  - MINORITY OWNED BUSINESS
  - AIOB | AMERICAN INDIAN OWNED BUSINESS
  - LOCAL GOVERNMENT
  - STATE GOVERNMENT
  - FEDERAL GOVERNMENT
  - FEDERAL AGENCY
  - BAOB | BLACK OWNED BUSINESS
  - HAOB | HISPANIC OWNED BUSINESS
  - APAOB | ASIAN PACIFIC OWNED BUSINESS
  - TRIBAL GOVERNMENT | TRIBALLY OWNED | TRIBAL COLLEGE
  - NAOB | NATIVE AMERICAN OWNED BUSINESS
  - SAAOB | SUBCONTINENT ASIAN INDIAN OWNED BUSINESS
  - NONPROFIT ORGANIZATION
  - VERY SMALL BUSINESS
  - HOSPITAL

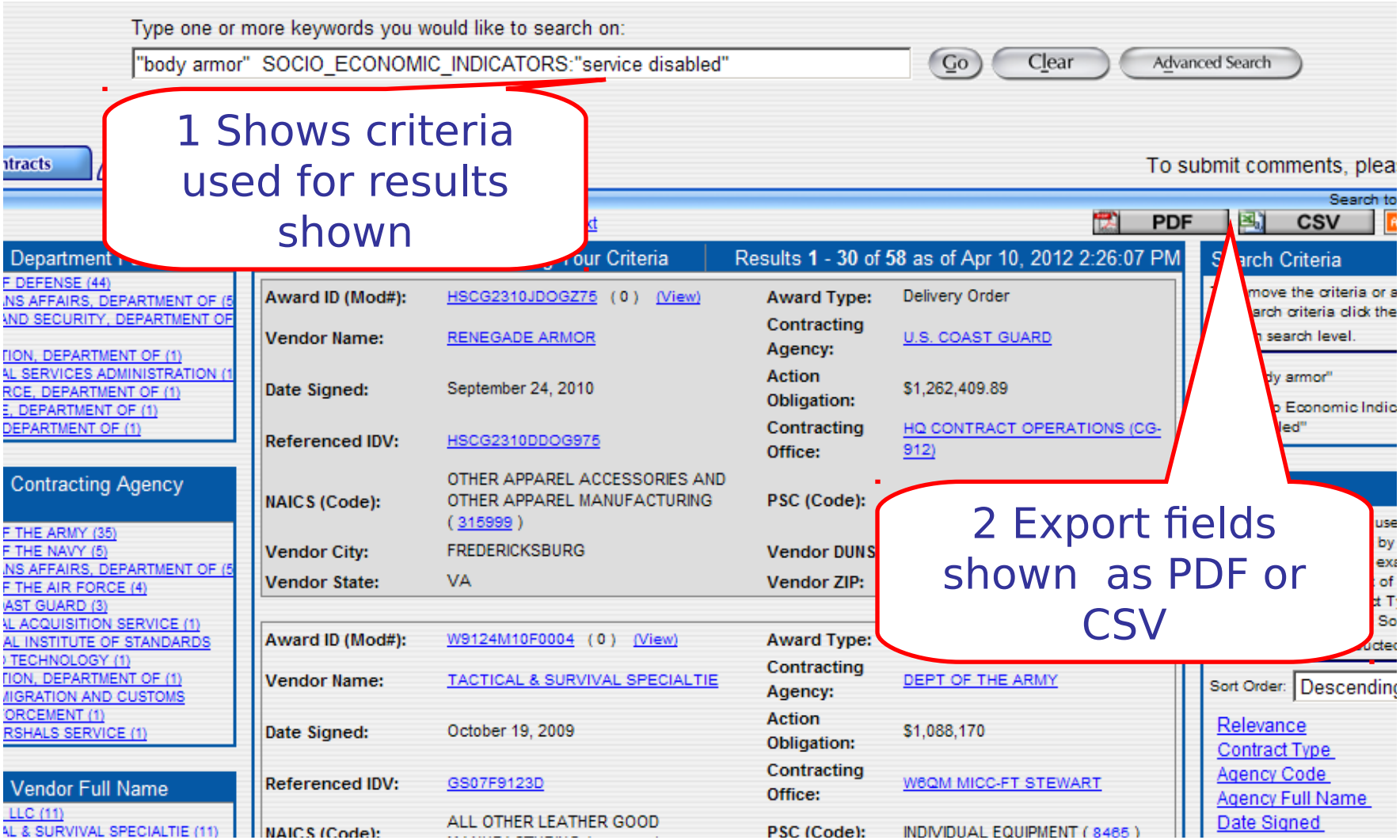
Keywords in Advanced Search Criteria (5/6)

- select SOCIO ECONOMIC INDICATORS like
  - ALASKAN NATIVE CORPORATION
  - INDIAN TRIBE
  - NATIVE HAWAIIAN ORGANIZATION TRIBALLY OWNED
  - OTHER MINORITY OWNED
  - COMMUNITY DEVELOPMENT CORP
  - LABOR SURPLUS AREA FIRM
  - FEDERALLY FUNDED R AND D CORP
  - LOCAL CITY GOVERNMENT
  - LOCAL COUNTY GOVERNMENT
  - LOCAL INTER MUNICIPAL GOVERNMENT
  - LOCAL GOVERNMENT OWNED
  - LOCAL MUNICIPALITY

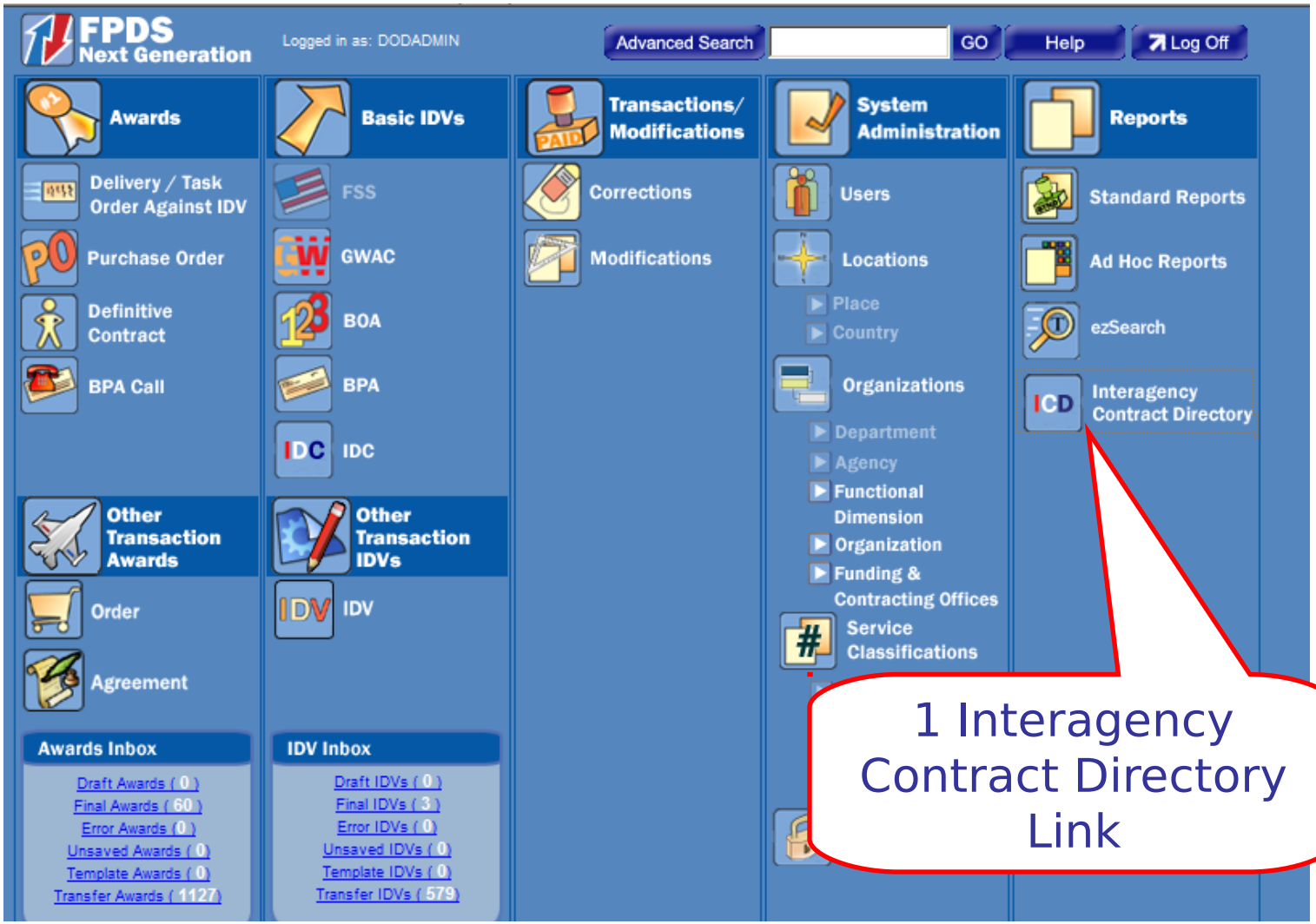
Keywords in Advanced Search Criteria (6/6)

- select SOCIO ECONOMIC INDICATORS like
  - SCHOOL DISTRICT
  - TOWNSHIP
  - FOREIGN GOVERNMENT
  - LAND GRANT COLLEGE 1862
  - LAND GRANT COLLEGE 1890
  - LAND GRANT COLLEGE 1994
  - PRIVATE UNIVERSITY OR COLLEGE
  - SCHOOL OF FORESTRY
  - HIGHER LEARNING
  - VETERINARY COLLEGE
  - VETERINARY HOSPITAL
  - HISPANIC SERVICING INSTITUTION
  - AND OTHERS NOT LISTED HERE

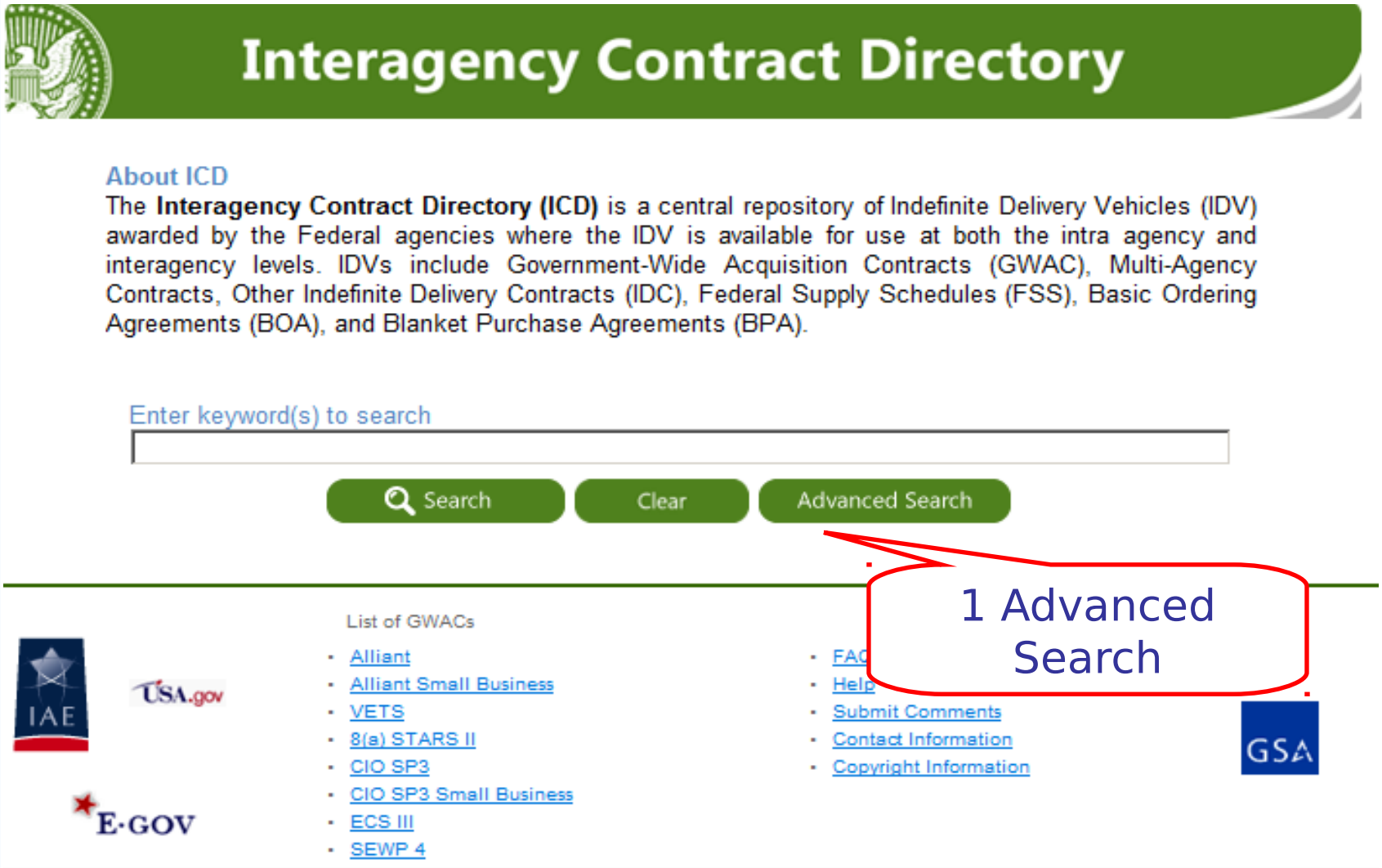
ezSEARCH Advanced SEARCH


Type one or more keywords you would like to search on:
"body armor" SOCIO_ECONOMIC_INDICATORS:"service disabled"
Go
Clear
Advanced Search
1 Shows criteria used for results shown
PDF
CSV
Results 1 - 30 of 58 as of Apr 10, 2012 2:26:07 PM
Award ID (Mod#): HSCG2310JDOGZ75 (0) (View)
Award Type: Delivery Order
Vendor Name: RENEGADE ARMOR
Contracting Agency: U.S. COAST GUARD
Date Signed: September 24, 2010
Action Obligation: $1,262,409.89
Referenced IDV: HSCG2310DDOG975
Contracting Office: HQ CONTRACT OPERATIONS (CG-912)
NAICS (Code): OTHER APPAREL ACCESSORIES AND OTHER APPAREL MANUFACTURING (315999)
PSC (Code):
Vendor City: FREDERICKSBURG
Vendor DUNS
Vendor State: VA
Vendor ZIP:
Award ID (Mod#): W9124M10F0004 (0) (View)
Award Type:
Vendor Name: TACTICAL & SURVIVAL SPECIALTIE
Contracting Agency: DEPT OF THE ARMY
Date Signed: October 19, 2009
Action Obligation: $1,088,170
Referenced IDV: GS07F9123D
Contracting Office: W6QM MICC-FT STEWART
NAICS (Code): ALL OTHER LEATHER GOOD
PSC (Code): INDIVIDUAL EQUIPMENT (8465)
Contracting Agency
Vendor Full Name
2 Export fields shown as PDF or CSV
Sort Order:
Relevance
Contract Type
Agency Code
Agency Full Name
Date Signed

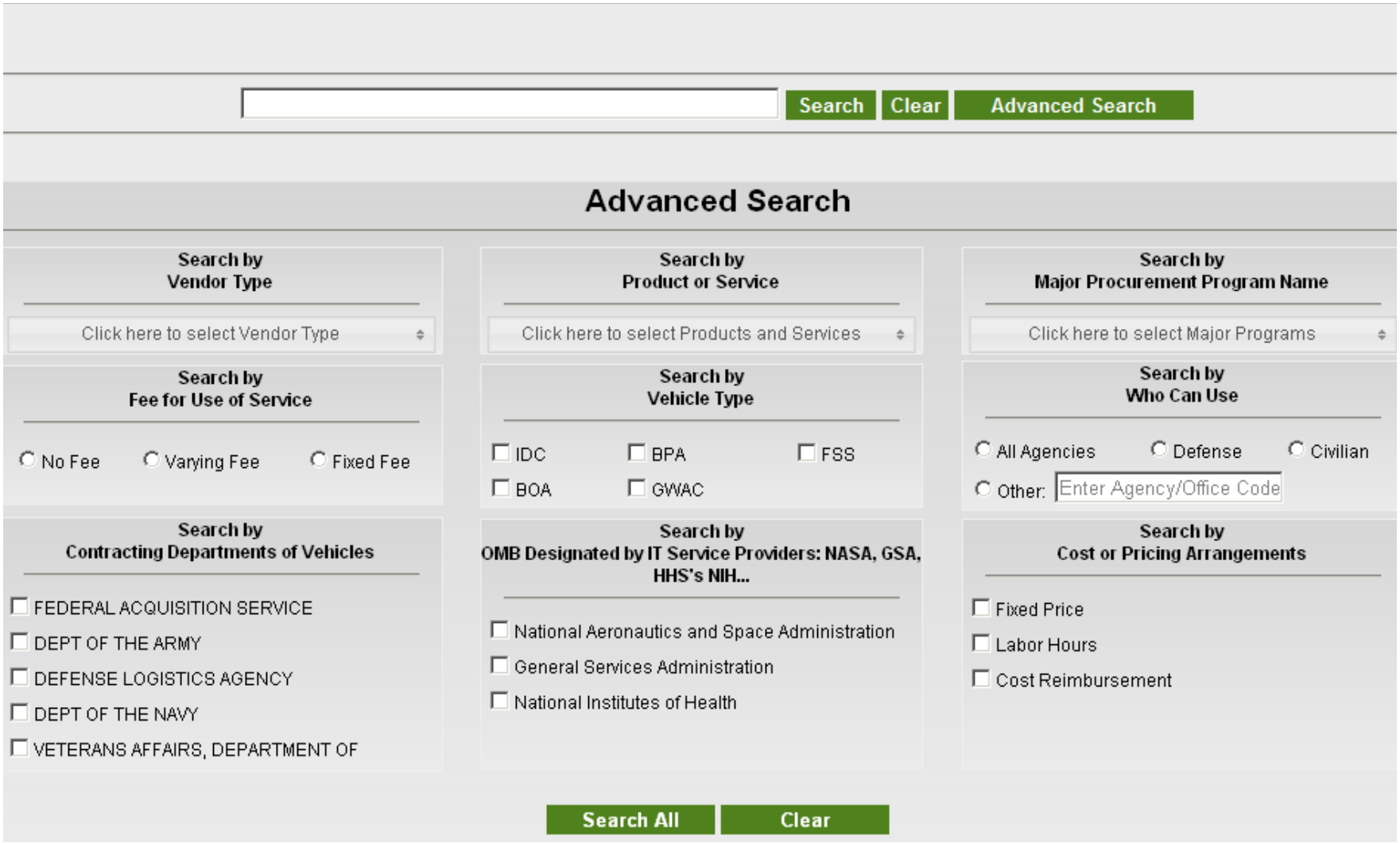
Interagency Contract Directory



https://www.contractdirectory.gov


Interagency Contract Directory
About ICD
The Interagency Contract Directory (ICD) is a central repository of Indefinite Delivery Vehicles (IDV) awarded by the Federal agencies where the IDV is available for use at both the intra agency and interagency levels. IDVs include Government-Wide Acquisition Contracts (GWAC), Multi-Agency Contracts, Other Indefinite Delivery Contracts (IDC), Federal Supply Schedules (FSS), Basic Ordering Agreements (BOA), and Blanket Purchase Agreements (BPA).
Enter keyword(s) to search
Search
Clear
Advanced Search
1 Advanced Search
List of GWACs
Alliant
Alliant Small Business
VETS
8(a) STARS II
CIO SP3
CIO SP3 Small Business
ECS III
SEWP 4
FAQ
Help
Submit Comments
Contact Information
Copyright Information
IAE
USA.gov
E-GOV
GSA

Interagency Contract Directory



FPDS Standard Reports

WHO	WHAT	WHERE	WHEN	HOW	SYS Admin
Awards by Contractor Type	Contract Detail	Buy American Act Place of Manufacture	Contract Detail	Bundling & Consolidated Contracts	Audit Procedures
Contractor Search	Federal Contract Actions & Dollars	Geographic Report by Place of Performance	Procurement History for Market Research Report	Buying Through Government Acquisition Vehicle	Competition Based on Obligations
	Procurement History for Market Research	Geographic Report by Vendor Location		Competition	Contracting Office Report
	Total Actions by NAICS			Funding Report	Individual Data Item Oversight Tracker
	Total Actions by PSC			Local Area Set Aside Report	List of Users
	Trade Agreements			Performance Based Acquisition	National Interest Action
				Purchase Card as Payment Method	Rerepresentation Eligible Actions
				Recycled Content Product Purchasing Data	Rerepresentation
				SB Achievements by Awarding Organization	Status of Actions
				SB Competitiveness Demonstration Program	Transfer Action
				SB Goaling Report	Workload Report
				OfficialSB Goaling Report for FY2005 & 2006	

NEW FPDS Standard Reports

- How Often is ONE Offer Reported on a Competitive Award?
  - HOW – Competitive Procedures, But One Offer Report
- When are Order Placed Under Wrong IDV
  - WHO – Orders Referencing Incorrect IDV Report
- When Was the IDV Dollar Ceiling Amount Exceeded?
  - HOW – IDVs Whose Orders are Over the IDV Ceiling Amount
- When are Orders Placed After IDV Last Date to Order
  - HOW – Orders Placed After IDV Last Date to Order Report

NEW FPDS Standard Reports

- TOP100 Vendor is Reported as Small Business
  - HOW – Potential Vendor Anomaly Report
- Identify T4C and T4D awards in a date range
  - HOW – Contract Termination for Default-Cause Report
- List Initial Award Where a Subcontract Plan is Required
  - HOW – Subcontracting Plan Report
- How Many Unique SB or not-SB Vendors are Used
  - HOW – Unique Vendors

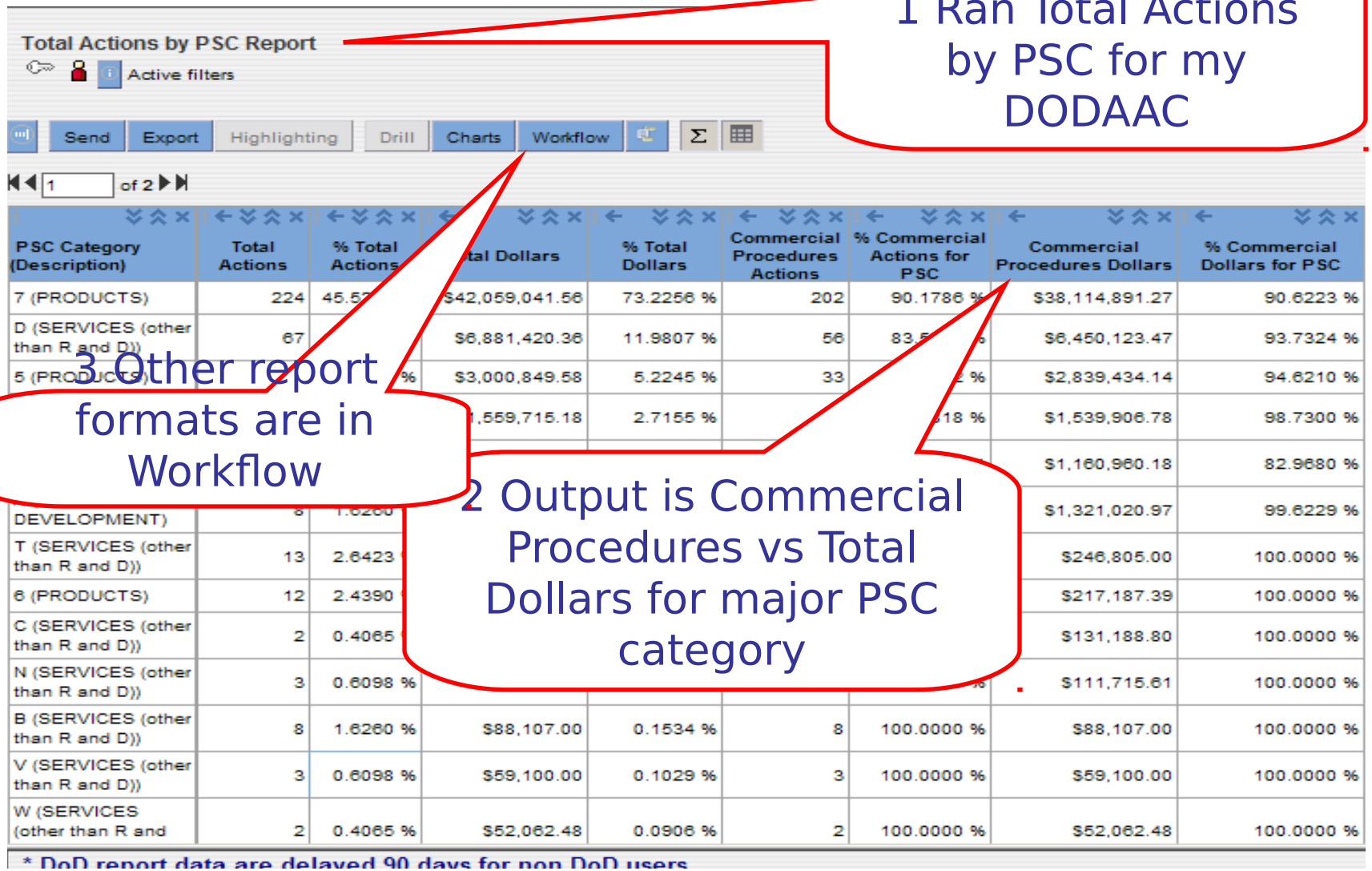
Frequently Used Standard Reports

- What are My Total Awards?
  - WHAT – Federal Contract Actions and Dollars Report
- How Am I Doing on Small Business Goals?
  - HOW – SB Achievements by Awarding Activity Report
- What Products or Services am I Buying?
  - WHAT – Total Actions by PSC – showing % commercial
  - Initial Report is by 1st Character of PSC (C – A&E)
  - Can Drill Down to first 2 character of PSC or whole PSC
  - Drill to PSC-Socio Economic workflow
    - Total Actions and Dollars for all business sizes by PSC
    - Actions, Dollars & Percent for SB, SDB, 8(a), SDVOSB, etc.

Frequently Used Standard Reports

- What is Data is Available on one Contract?
  - WHAT – Contract Detail Report
- Education, HBCU, and MI Are Missing from SB Report
  - Education is not Part of the SBA Goaling Report
  - WHO – Awards by Contractor Type
- How Am I Doing in Competition Goals?
  - HOW – Competition Report (Based on Obligations)
  - HOW – Competition Report Old
- How Many CARs are DRAFT or ERRORED OUT?
  - SYSADMIN – Status of Actions Report
  - Drill Down to Award Detail With Prepared By and Dates

By PSC Report - Workflows



PSC Category (Description)	Total Actions	% Total Actions	tal Dollars	% Total Dollars	Commercial Procedures Actions	% Commercial Actions for PSC	Commercial Procedures Dollars	% Commercial Dollars for PSC
7 (PRODUCTS)	224	45.57	$42,059,041.56	73.2256 %	202	90.1786 %	$38,114,891.27	90.6223 %
D (SERVICES (other than R and D))	67		$6,881,420.36	11.9807 %	56	83.5 %	$6,450,123.47	93.7324 %
5 (PRODUCTS)		%	$3,000,849.58	5.2245 %	33	2 %	$2,839,434.14	94.6210 %
			,559,715.18	2.7155 %		18 %	$1,539,906.78	98.7300 %
							$1,160,960.18	82.9680 %
DEVELOPMENT)	8	1.6260					$1,321,020.97	99.6229 %
T (SERVICES (other than R and D))	13	2.6423					$246,805.00	100.0000 %
6 (PRODUCTS)	12	2.4390					$217,187.39	100.0000 %
C (SERVICES (other than R and D))	2	0.4065					$131,188.80	100.0000 %
N (SERVICES (other than R and D))	3	0.6098 %				%	$111,715.61	100.0000 %
B (SERVICES (other than R and D))	8	1.6260 %	$88,107.00	0.1534 %	8	100.0000 %	$88,107.00	100.0000 %
V (SERVICES (other than R and D))	3	0.6098 %	$59,100.00	0.1029 %	3	100.0000 %	$59,100.00	100.0000 %
W (SERVICES (other than R and	2	0.4065 %	$52,062.48	0.0906 %	2	100.0000 %	$52,062.48	100.0000 %

* DoD report data are delayed 90 days for non DoD users

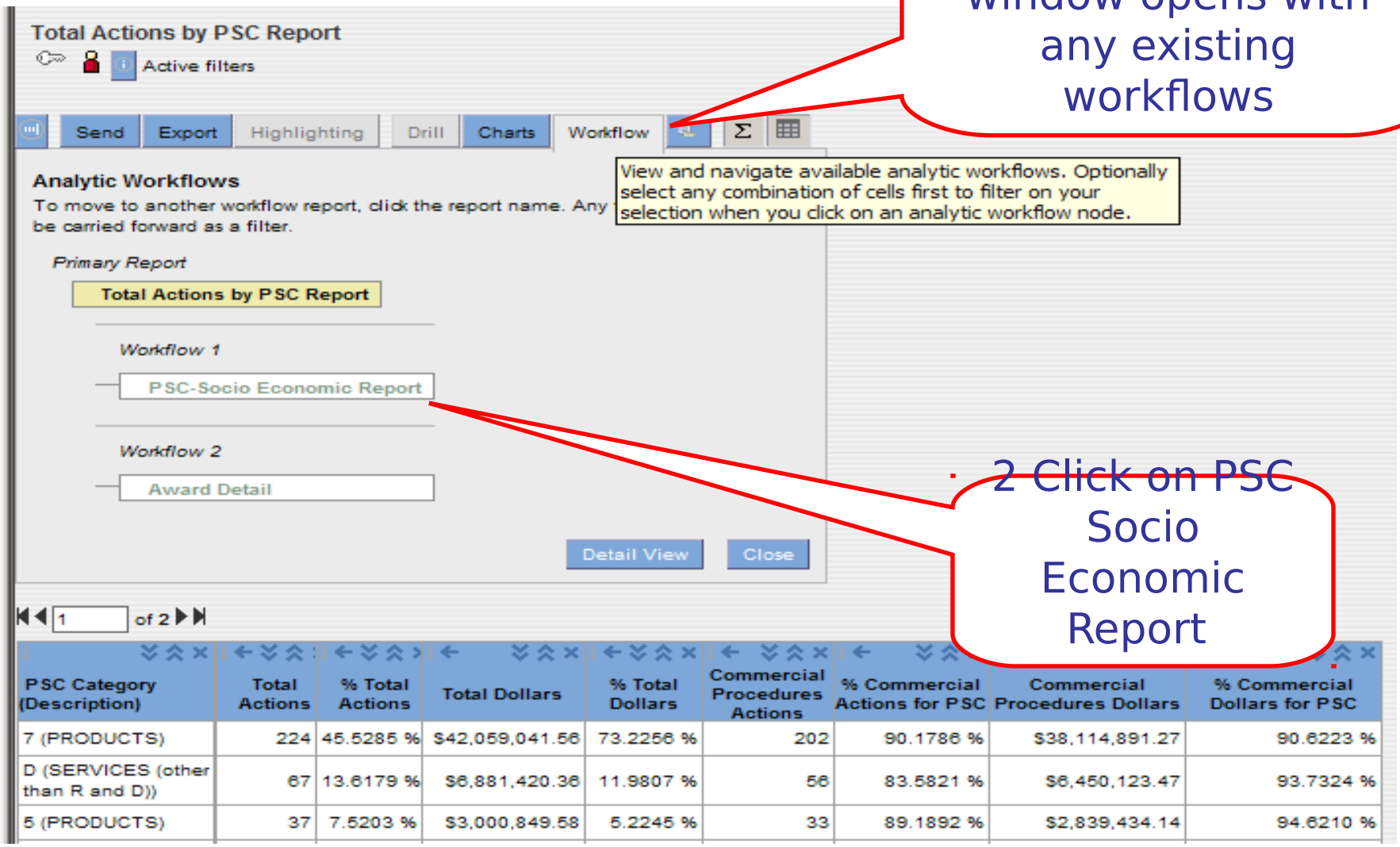
1 Ran Total Actions by PSC for my DODAAC

3 Other report formats are in Workflow

2 Output is Commercial Procedures vs Total Dollars for major PSC category

By PSC Report - Workflows

1 Click on Workflow; window opens with any existing workflows



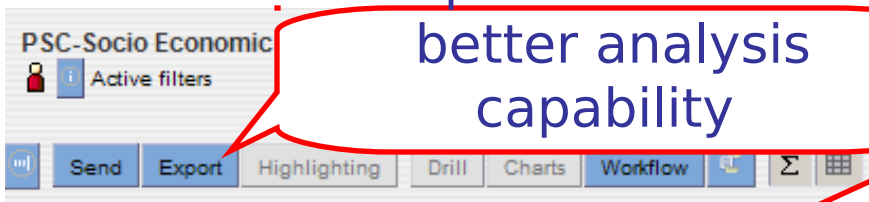
2 Click on PSC Socio Economic Report

PSC Category (Description)	Total Actions	% Total Actions	Total Dollars	% Total Dollars	Commercial Procedures Actions	% Commercial Actions for PSC	Commercial Procedures Dollars	% Commercial Dollars for PSC
7 (PRODUCTS)	224	45.5285 %	$42,059,041.56	73.2256 %	202	90.1786 %	$38,114,891.27	90.6223 %
D (SERVICES (other than R and D))	67	13.6179 %	$6,881,420.36	11.9807 %	56	83.5821 %	$6,450,123.47	93.7324 %
5 (PRODUCTS)	37	7.5203 %	$3,000,849.58	5.2245 %	33	89.1892 %	$2,839,434.14	94.6210 %

By PSC Report - Workflows

2 Export to EXCEL for better analysis capability

1 PSC workflow showing awards by PSC and how much in each business category



PSC Category (Description)	PSC Sub Category (Description)	PSC Code (Description)	Total Actions	Total Dollars	Small Business Actions	% Small Business Actions	Small Business Dollars	% Small Business Dollars	Small Disadvantaged Business	% Small Disadvantaged Business
R (SERVICES (other than R and D))	R4 (PROFESSIONA SERVICES)	R426 (COMMUNICATIONS SERVICES)	4	$159,000.00	4	100.0000 %	$159,000.00	100.0000 %	0	0.0000 %
R (SERVICES (other than R and D))	R4 (PROFESSIONA SERVICES)	R413 (SPECIFICATIONS DEVELOPMENT SERVICES)	2	$5,400.00	2	100.0000 %	$5,400.00	100.0000 %	2	100.0000 %
3 (PRODUCTS)	34 (METALWORKI MACHINERY)	3449 (MSC SECONDARY METAL FORM-CUT MACH)	1	$9,913.56	1	100.0000 %	$9,913.56	100.0000 %	0	0.0000 %
R (SERVICES (other than R and D))	R4 (PROFESSIONA SERVICES)	R412 (SIMULATION)	1	$64,800.00	1	100.0000 %	$64,800.00	100.0000 %	1	100.0000 %
Z (SERVICES (other than R and D))	Z1 (MAINT, ALTER, REPAIR BUILDINGS)	Z111 (MAINT-REP-ALT/OFFICE BLDGS)	5	$16,425.04	5	100.0000 %	$16,425.04	100.0000 %	5	100.0000 %
A (RESEARCH AND DEVELOPMEN	AD (DEFENSE (OTHER) RandD)	AD96 (OTHER DEFENSE (MANAGEMENT/SUPPOR	1	$51,600.00	1	100.0000 %	$51,600.00	100.0000 %	0	0.0000 %
D (SERVICES (other than R and D))	D3 (ADP AND TELECOMMUN	D314 (ADP ACQUISITION SUP SVCS)	4	$626,467.00	4	100.0000 %	$626,467.00	100.0000 %	0	0.0000 %

Understanding Standard Reports

- How Do I Export the Report to My Desktop?
  - Click on EXPORT – export window opens
  - Four File Types are Available
    - EXCEL, HTML, or PDF 5,000 Row Limit
    - CSV (comma separated values) has 30,000 Row Limit
  - EXCEL
    - Regular Formatting or Pivot Table
    - EXCEL Analysis Available
  - HTML
    - No Analysis Tools; Ready for Web Page Placement
  - CSV – Import into Other Software for Analysis
  - PDF –SELECT PDF to Print & use 100% of Normal Size
  - Click on EXPORT at bottom of the export window

Understanding Standard Reports

- Save Selection Parameters for Future Runs
  - Setup Reports for Each of the Last 5 Fiscal Years
- Drill Down to FY, Agency, Commands, and Offices
- 'Award Detail' Drill Down on All Reports
  - Most Fields on the CAR are available
  - Limit is 5,000 Rows of EXCEL, PDF, or HTML Output
  - 30,000 Row of CSV Output can be Saved or Emailed
- Limited to 5 Years of Data per Report
- Has a Report Appendix
  - Shows Selection Criteria and Data Excluded from Report
  - Describes How Each Column is Calculated

Understanding Standard Reports

- How Do I Know What is the Selection Criteria?
  - Top Left – Click on ‘i’ Beside ACTIVE FILTERS
- How Was a Given Column Calculated from Data?
  - Between Workflow and SIGMA – Click Header + Footer
  - Appendix Describes Each Column and any Exclusions
- How Do I Email the Report to Someone?
  - Click on SEND – email window opens
  - Type email address separated by commas – no spaces
  - Send only as an EXCEL or CSV File Attachment
  - Click on SEND at bottom of the email window

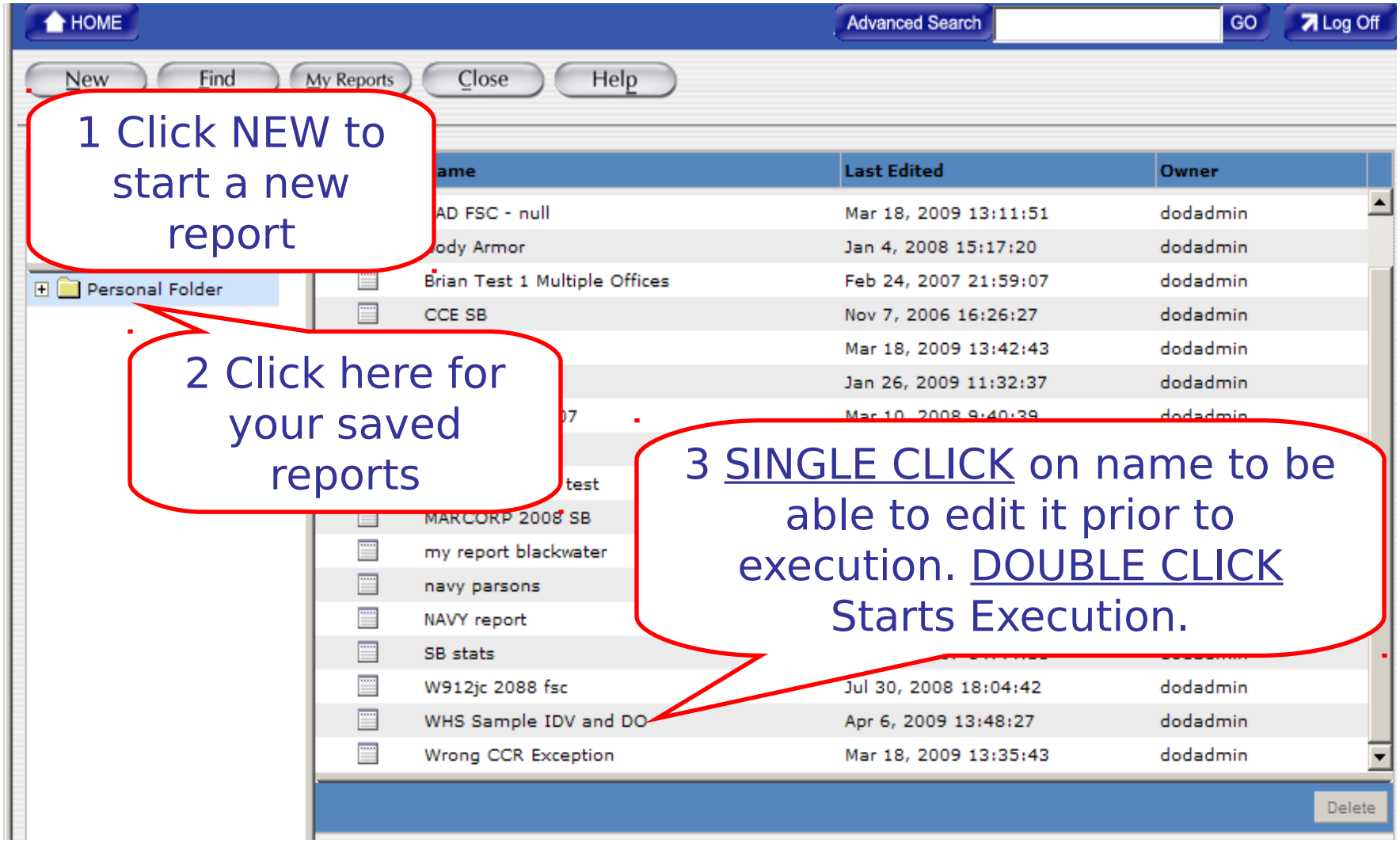
Ad Hoc Requirements

- Must Know the FPDS Data Organization and Nuances
  - ‘Contracting Department ID’ = 9700 to Retrieve all DoD Awards
  - ‘Contracting Agency ID’ & ‘Contracting Office ID’ is Awarding Office
  - ‘Principal POP Location Code’(city) is no longer used – Zip+4 Used
  - ‘Award or IDV Type’ under Transaction Information gets PO vs IDC
- Automatically Summarizes to the lowest level of detail
  - Select only fields PSC, ACTIONS, and DOLLARS
  - Report Summarizes all CARs with Same PSC to One Report Line
- Ref IDV PIID, PIID, Mod Num, & Trans Num for CAR Detail
- 5,000 Rows of Data into EXCEL, HTML, or PDF Format
- 30,000 Rows of CSV Data can be Saved or Emailed
  - Import into EXCEL or ACCESS or any Compatible Software

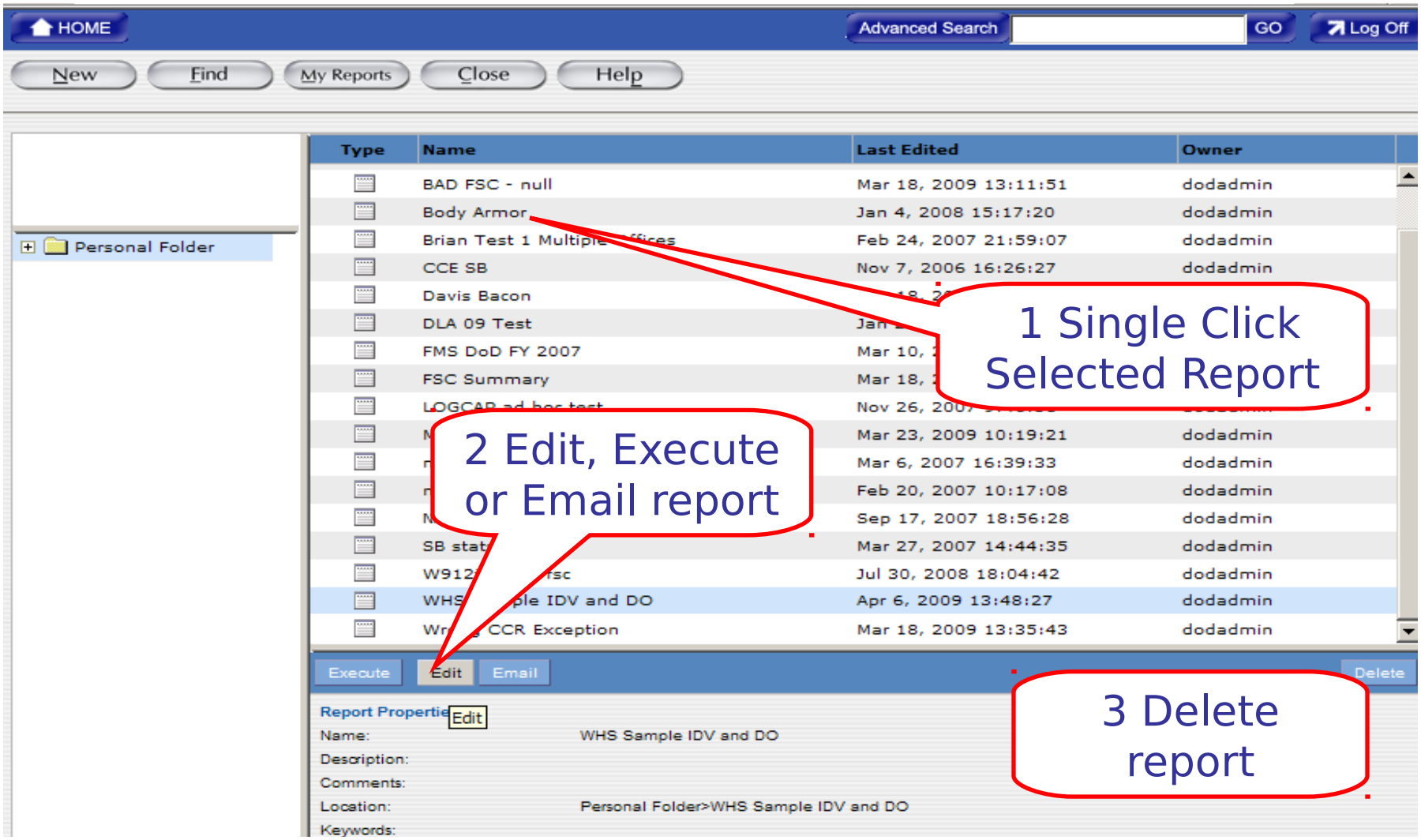
Ad Hoc - Starting Point

- Click ‘NEW’ to Create a new Ad Hoc Report
- Click ‘Personal Folder’ to Find Saved Reports
  - Find Name Given to Ad Hoc Report
  - Single Click on Name to Edit, Email, Delete, or Execute
  - Select Execute – Cannot Review Filters
  - Double Click on Name to Execute Without Review
  - Select Edit to Change or Review Filters
  - Edit Can Add Additional Attributes (Fields) to Output

Ad Hoc – Create New or Use a Saved



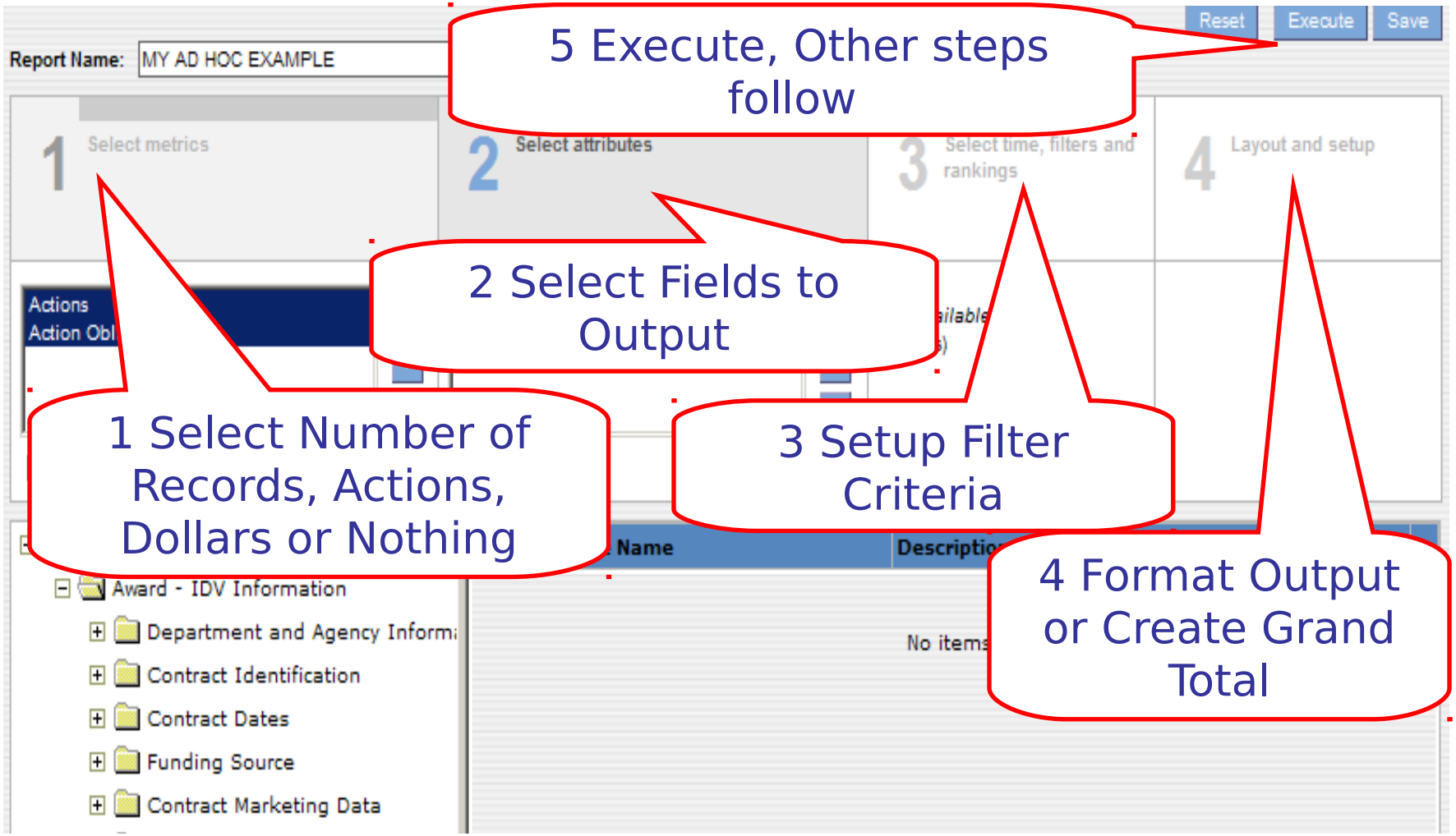
Ad Hoc – Email, Edit, Delete, or Execute



Ad Hoc – Same Steps for New or Saved

- Same Steps to Review or Create a Report
- 1 Select Metrics
- 2 Select Attributes
- 3 Select Filters
- 4 Layout and Setup
- 5 Execute
- 6 Supply Date Range for Date Signed
  - Or Date Range can be Last Modified Date
- 7 Display Report

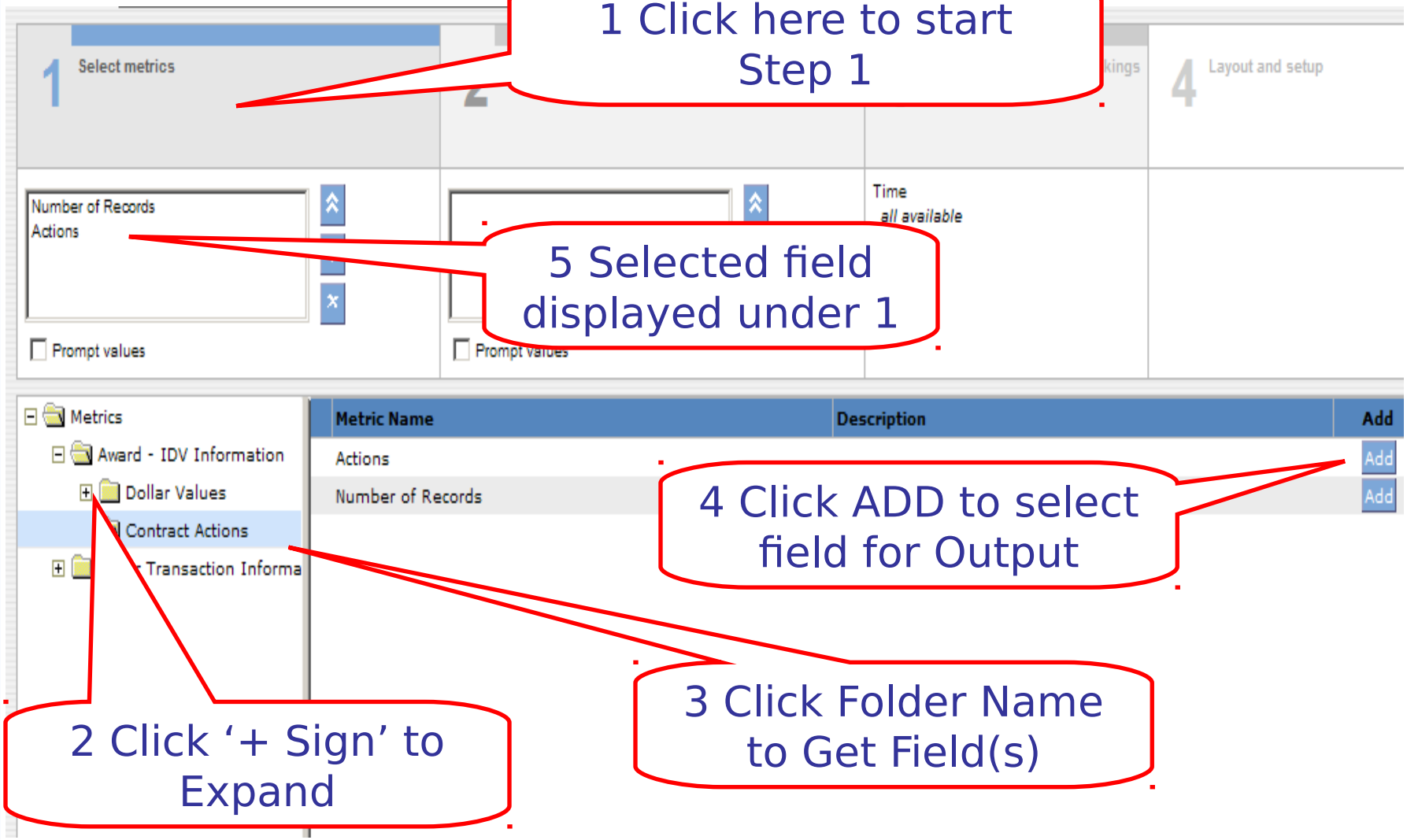
Ad Hoc – Steps to Create or Review



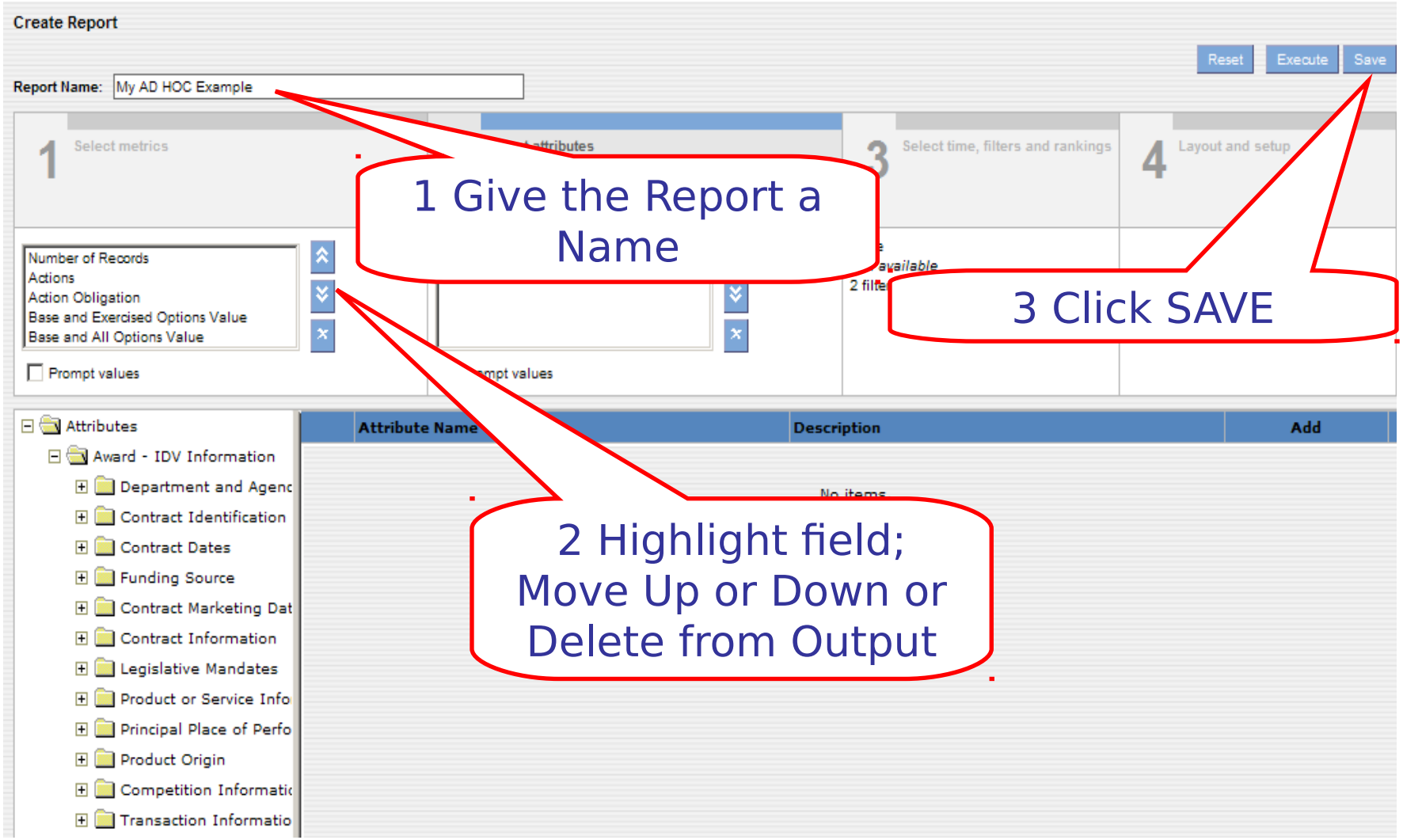
Ad Hoc – Step 1 Select Metrics

- Step 1 – Click on ‘1 Select Metrics’
  - Click PLUS sign (+) to Expand Data Categories
    - Award – IDV Information
  - Click Folder Name (not +) to Get Fields
  - Select Field for Output – Click ADD
  - Select ‘Number of Records’
  - Select ‘Actions’ first, then ‘Action Obligation’
  - METRICS can have calculations – sum, min, max, etc.
  - Change Order of Fields in Output
  - Delete Field from Output
- Save Report Frequently
  - Supply a ‘Report Name’; Click SAVE

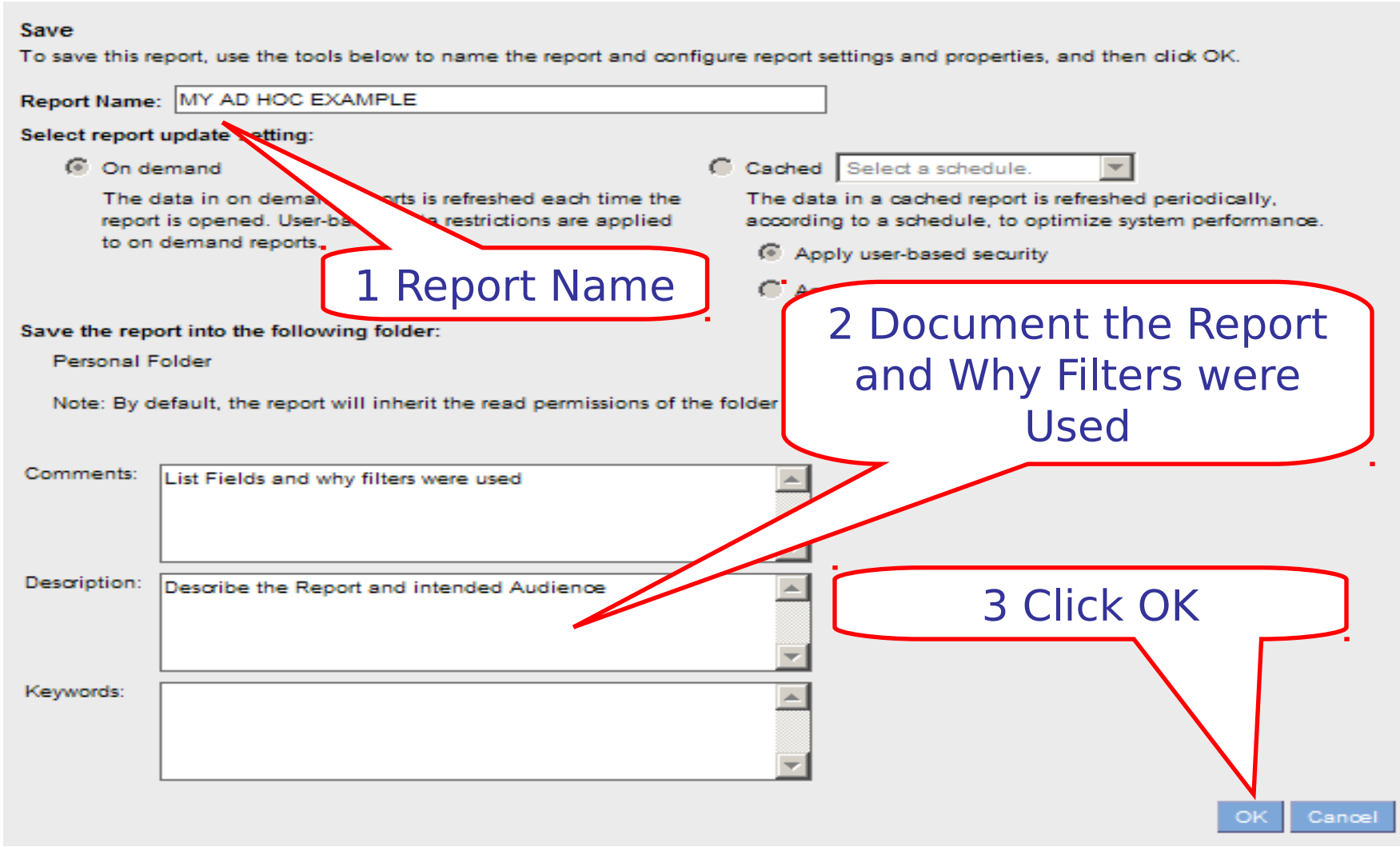
Ad Hoc – Step 1 Select Metrics



Ad Hoc – Save Work Frequently



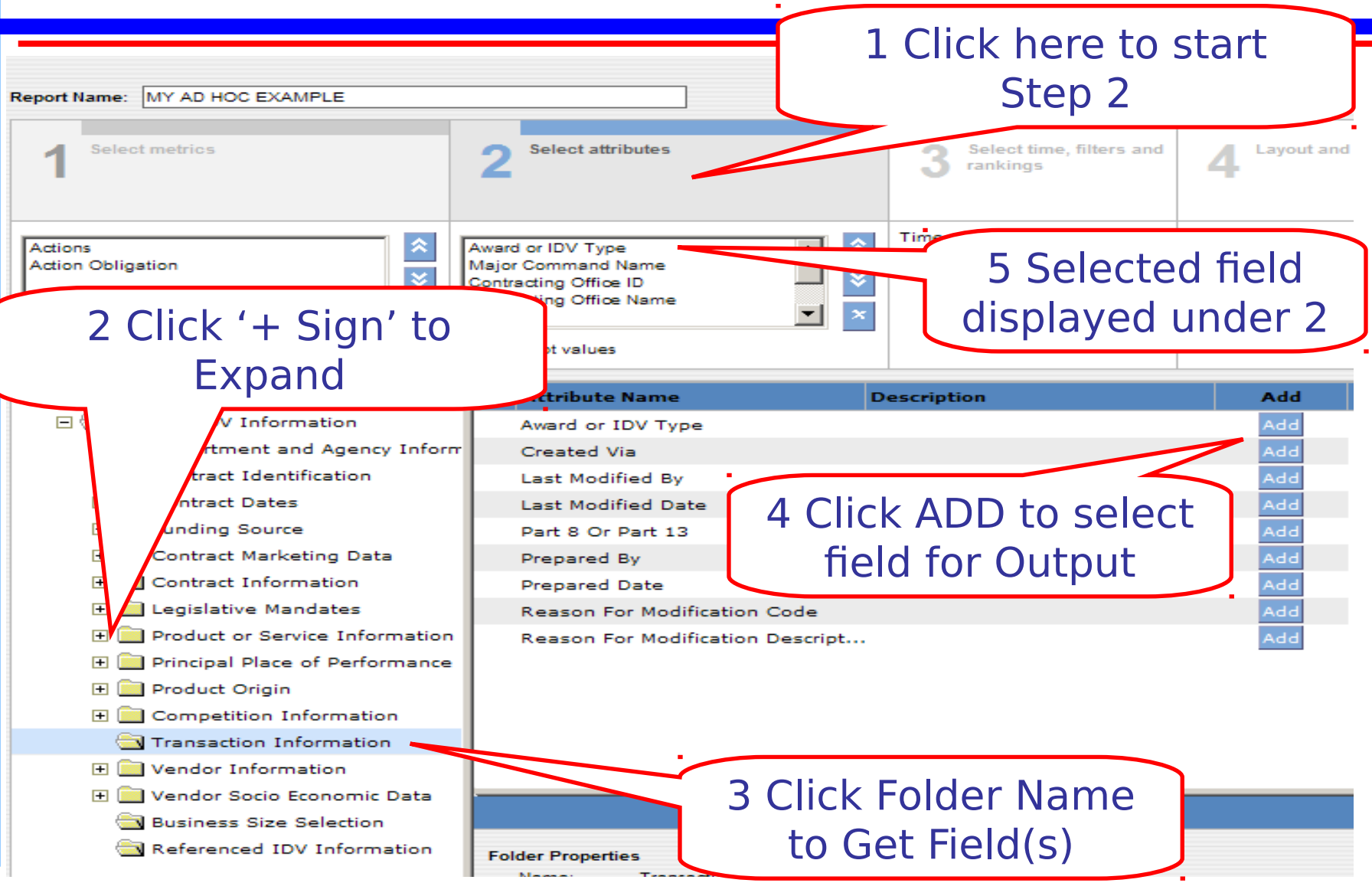
Ad Hoc – Save Work Frequently


Save
To save this report, use the tools below to name the report and configure report settings and properties, and then click OK.
Report Name: MY AD HOC EXAMPLE
Select report update setting:
On demand
The data in on demand reports is refreshed each time the report is opened. User-based restrictions are applied to on demand reports.
Cached
Select a schedule.
The data in a cached report is refreshed periodically, according to a schedule, to optimize system performance.
Apply user-based security
Save the report into the following folder:
Personal Folder
Note: By default, the report will inherit the read permissions of the folder
Comments:
List Fields and why filters were used
Description:
Describe the Report and intended Audience
Keywords:
OK
Cancel
1 Report Name
2 Document the Report and Why Filters were Used
3 Click OK

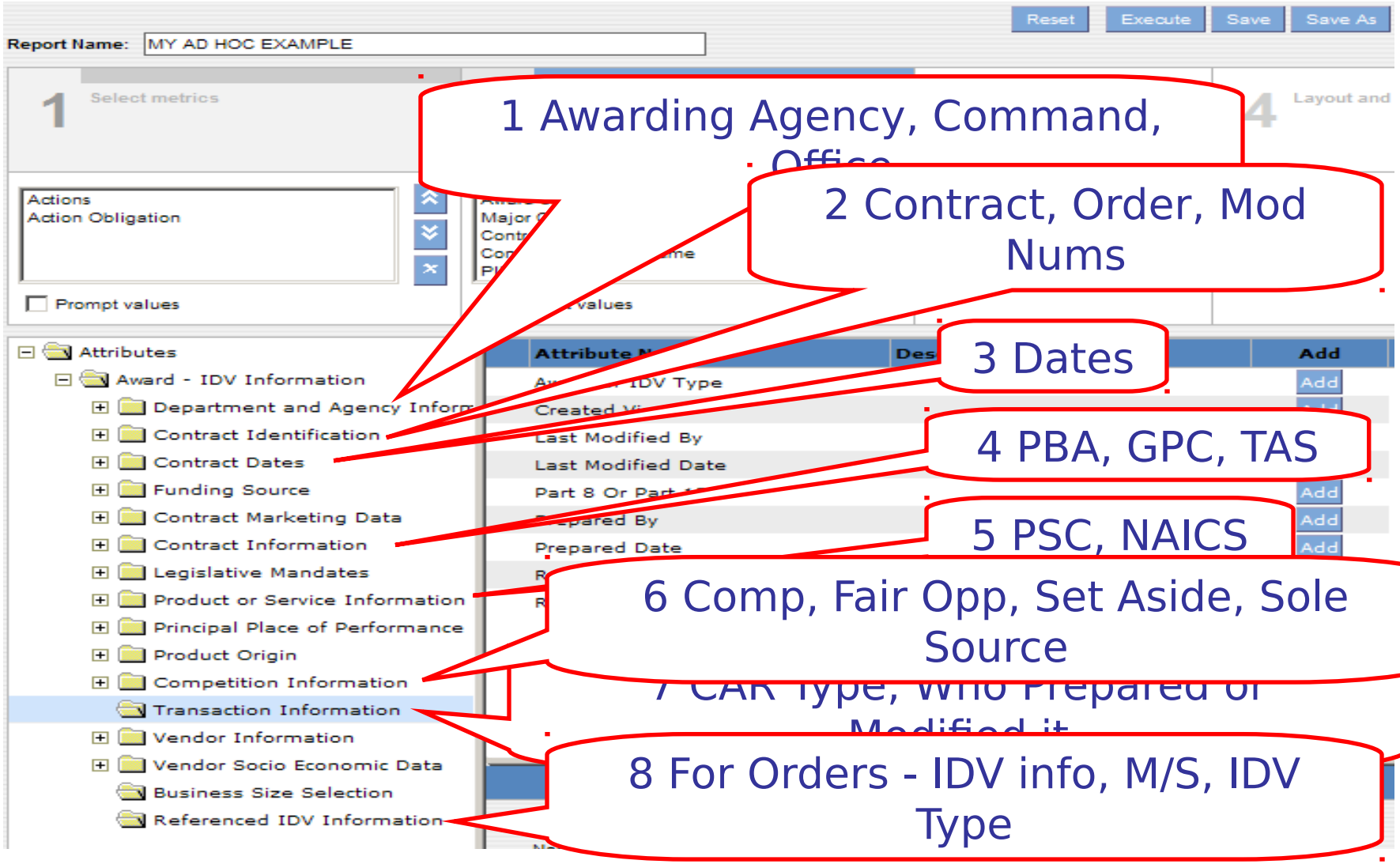
Ad Hoc – Step 2 Select Attributes

- Step 2 – Click on ‘2 Select Attributes’
  - Click PLUS sign (+) to Expand Data Categories
    - Award – IDV Information
  - Click Folder Name (not +) to Get Fields
  - Select Field for Output – Click ADD
    - Field Name Appears under 2 Select Attributes
    - Select Fields in Order of Report Appearance
    - Can Change Order of Fields in Output
    - Can Delete Field from Output

Ad Hoc – Step 2 Select Attributes



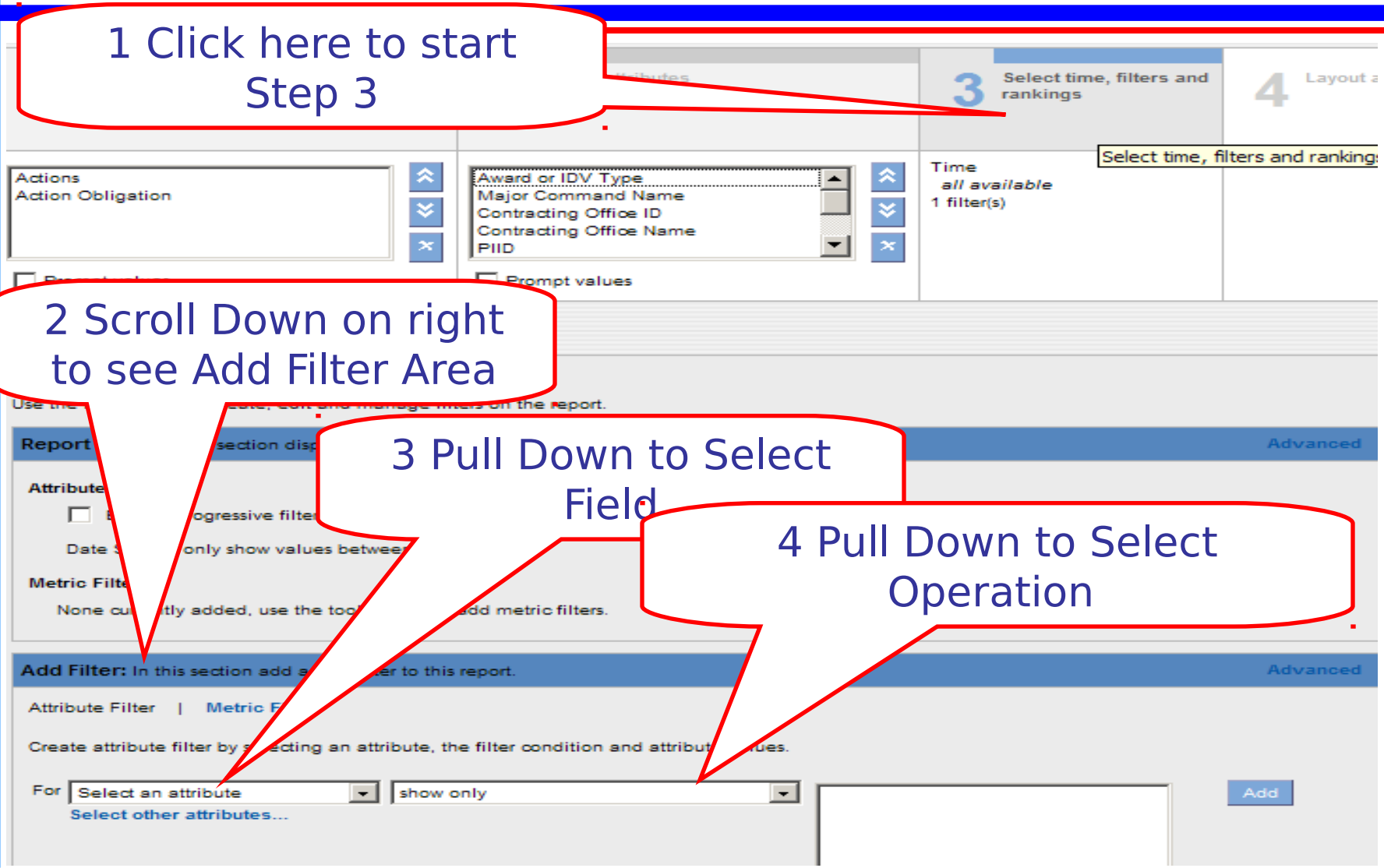
Ad Hoc – Step 2 Where Are Fields



Ad Hoc – Step 3 Select Filters

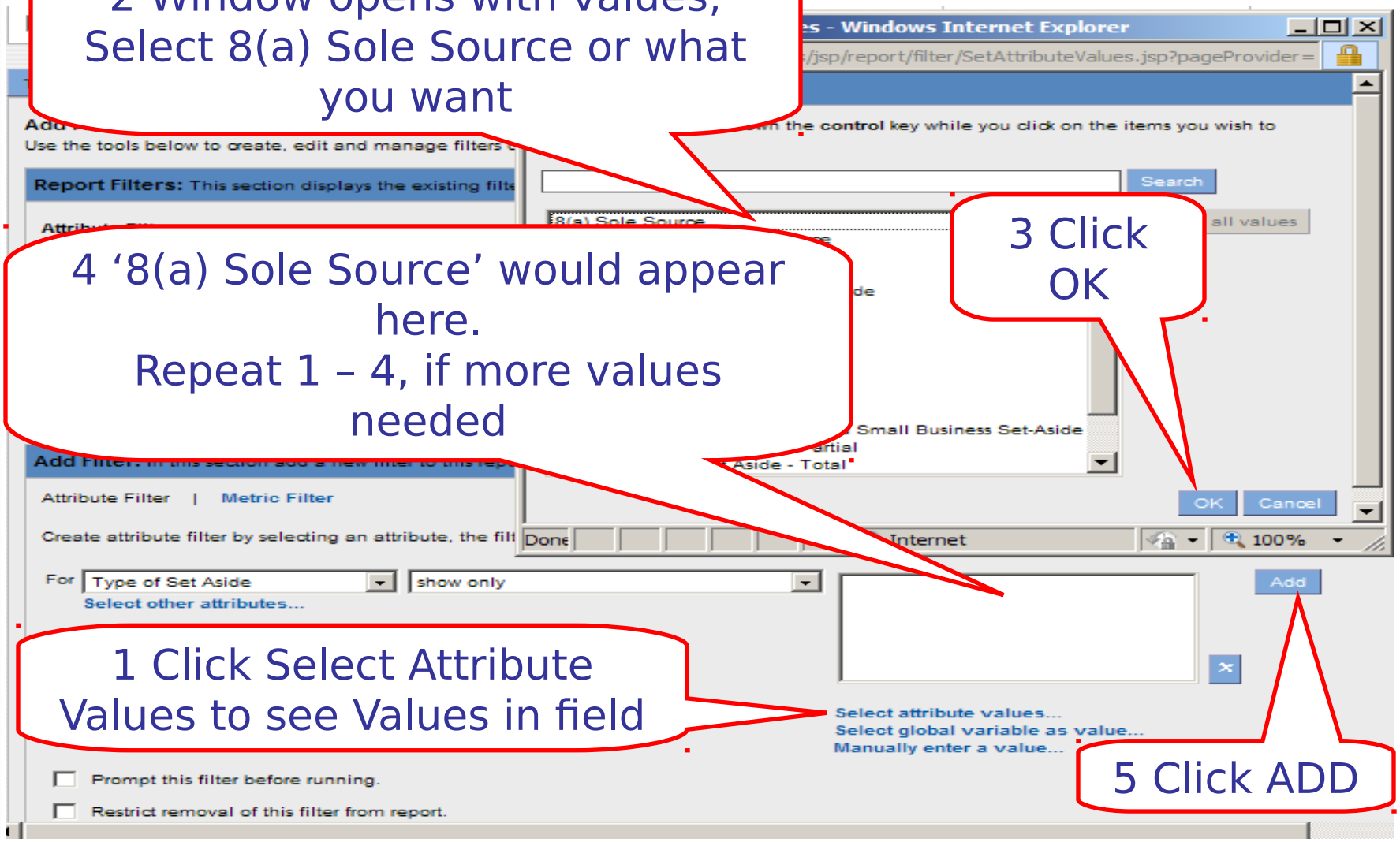
- Step 3 - Click on ‘3 Select time, filters ….’
  - Selection Criteria for CARs you want in report
- Scroll screen down to see ‘ADD Filter’ area
  - Use pull-down ‘Select an Attribute’ to select field
  - Select operation under ‘Show Only’
    - Show Only – select when field has given values
    - Exclude – Exclude when field has given values
    - Values that are Null – select when field was blank
    - Values Are Not Null – select when field has value

Ad Hoc – Step 3 Select Filters


1 Click here to start Step 3
2 Scroll Down on right to see Add Filter Area
3 Pull Down to Select Field
4 Pull Down to Select Operation
3 Select time, filters and rankings
4 Layout a
Select time, filters and rankings
Actions
Action Obligation
Award or IDV Type
Major Command Name
Contracting Office ID
Contracting Office Name
PIID
Prompt values
Time
all available
1 filter(s)
Report
Advanced
Attribute
Metric Filte
None cu tly added, use the too dd metric filters.
Add Filter: In this section add a er to this report.
Advanced
Attribute Filter | Metric F
Create attribute filter by s ecting an attribute, the filter condition and attribut ues.
For Select an attribute
show only
Add
Select other attributes...

Ad Hoc – Step 3 Select Filters

2 Window opens with values, Select 8(a) Sole Source or what you want



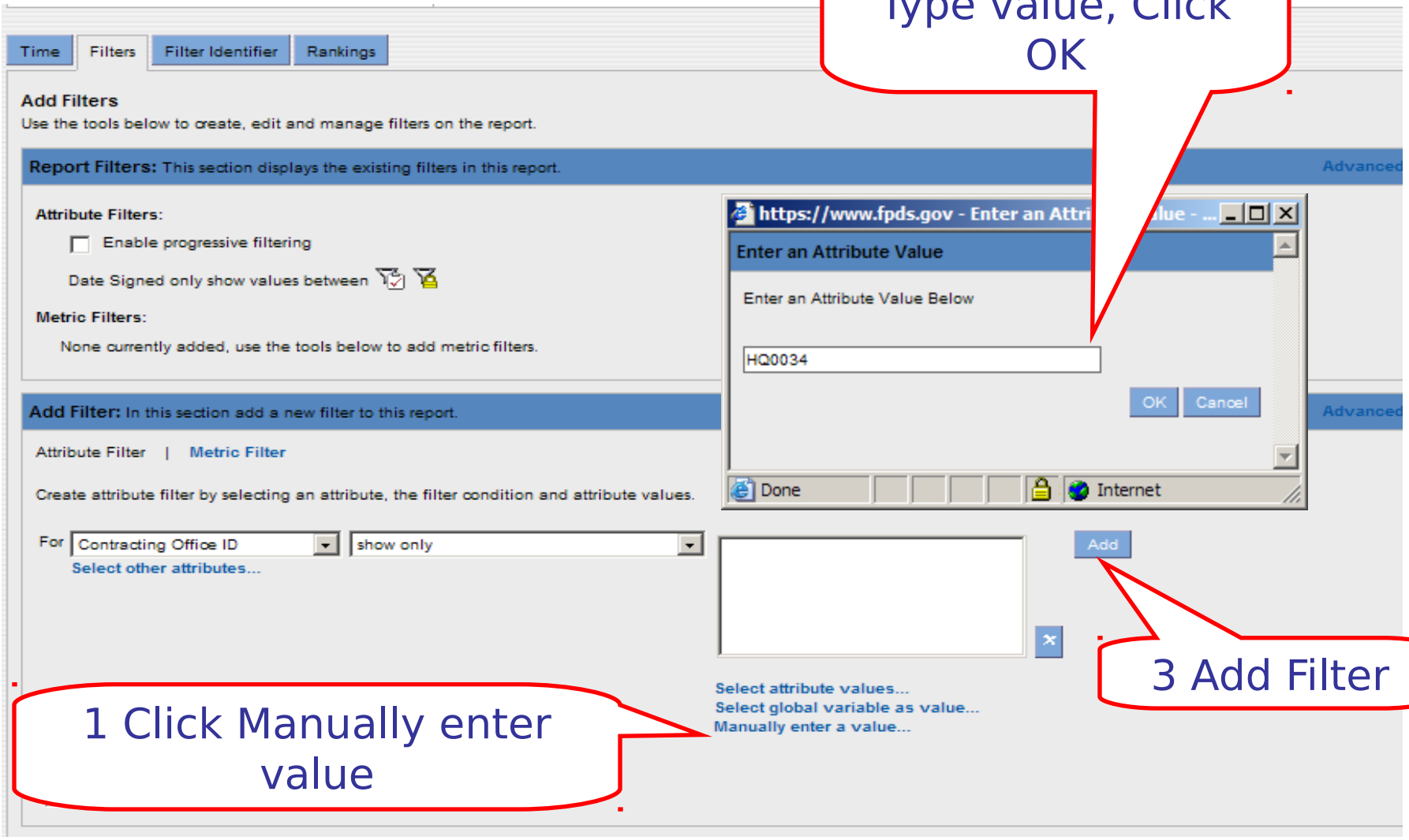
4 '8(a) Sole Source' would appear here.
Repeat 1 – 4, if more values needed

3 Click OK

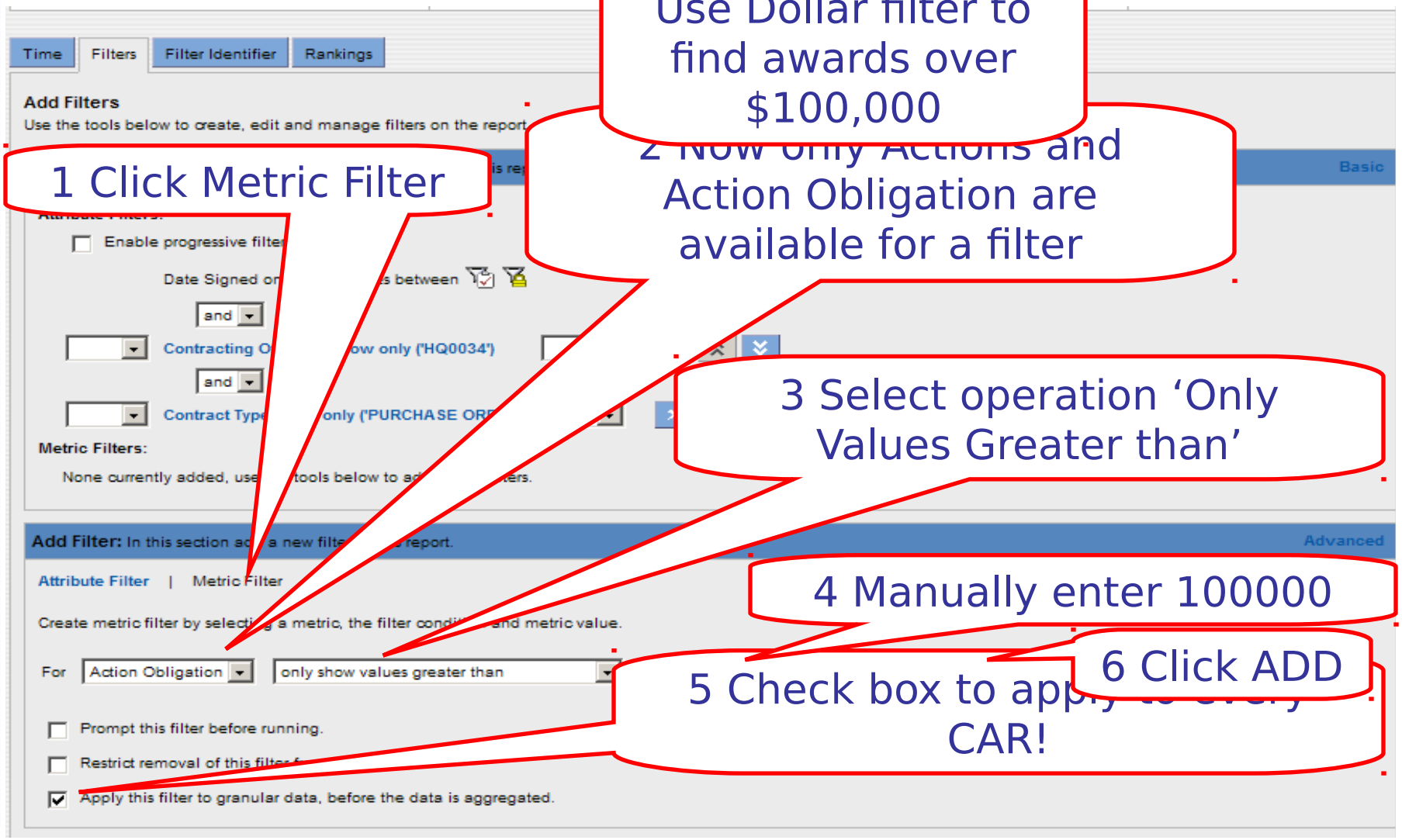
1 Click Select Attribute Values to see Values in field

5 Click ADD

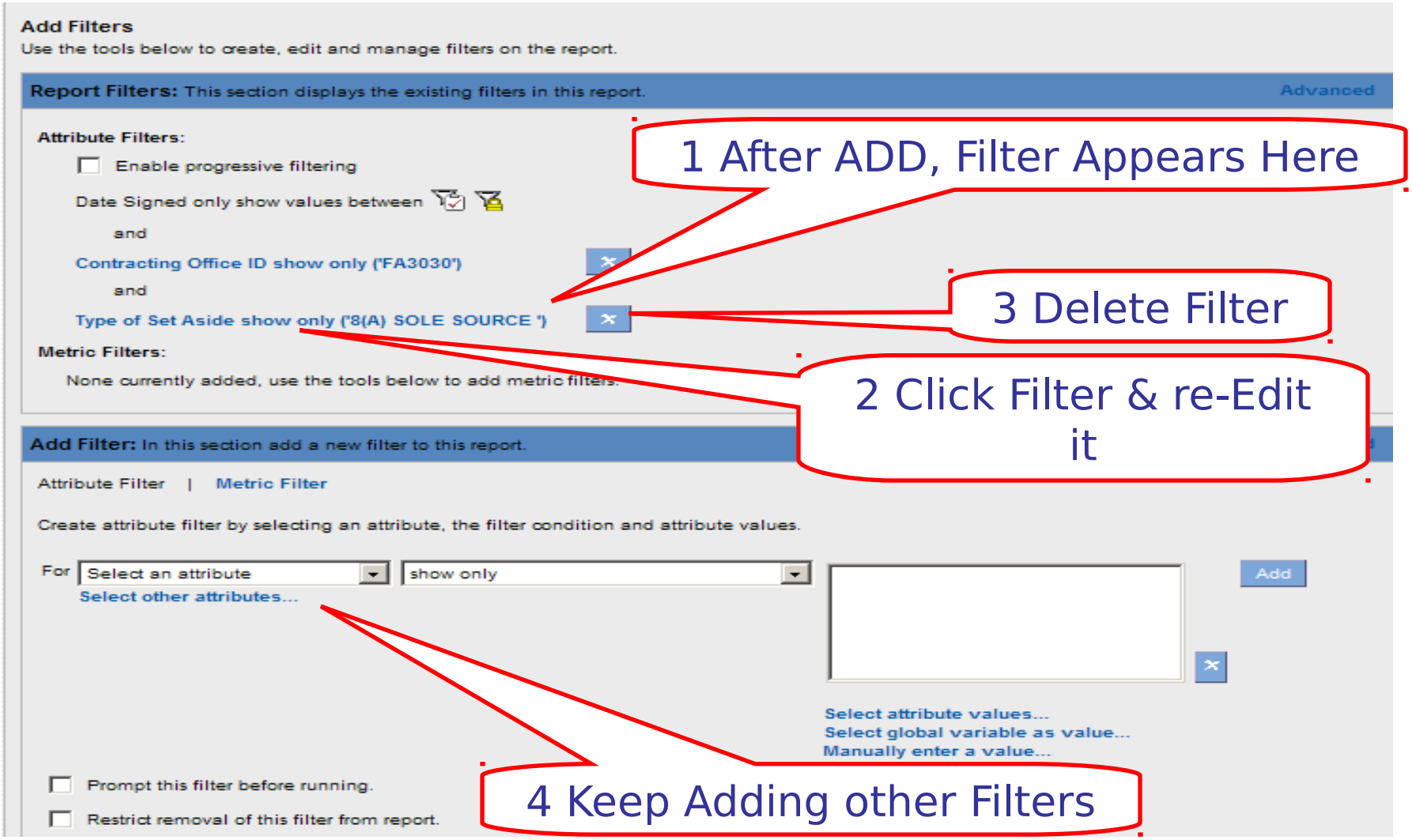
Ad Hoc – Step 3 Select Filter (continued)



Ad Hoc – Step 3 Select Filter (continued)



Ad Hoc – Step 3 Review Filters Created


Add Filters
Use the tools below to create, edit and manage filters on the report.
Report Filters: This section displays the existing filters in this report.
Advanced
Attribute Filters:
Enable progressive filtering
Date Signed only show values between
and
Contracting Office ID show only ('FA3030')
and
Type of Set Aside show only ('8(A) SOLE SOURCE ')
Metric Filters:
None currently added, use the tools below to add metric filters.
1 After ADD, Filter Appears Here
3 Delete Filter
2 Click Filter & re-Edit it
Add Filter: In this section add a new filter to this report.
Attribute Filter | Metric Filter
Create attribute filter by selecting an attribute, the filter condition and attribute values.
For
Select an attribute
show only
Add
Select other attributes...
Select attribute values...
Select global variable as value...
Manually enter a value...
Prompt this filter before running.
Restrict removal of this filter from report.
4 Keep Adding other Filters

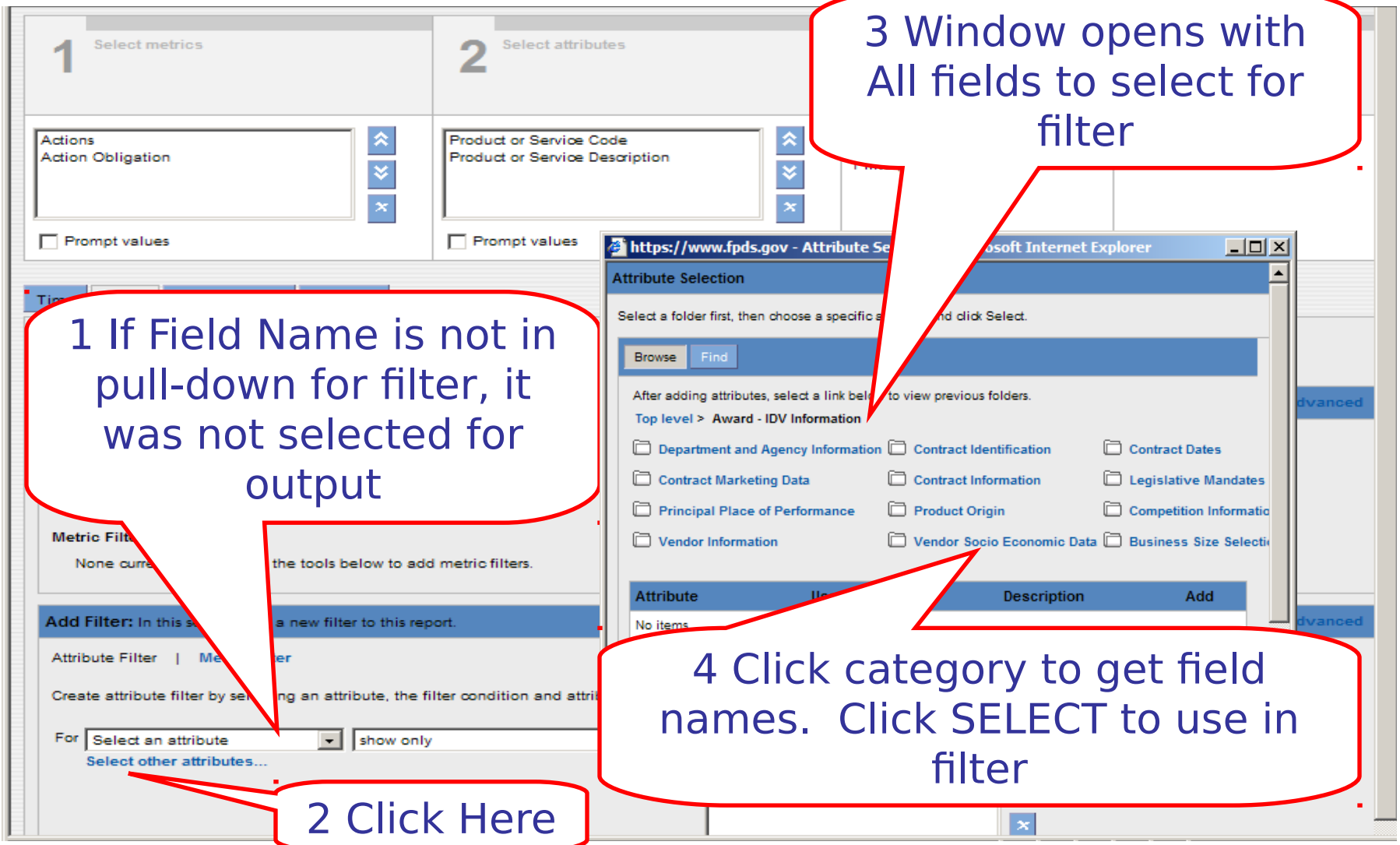
Ad Hoc – Step 3 Select Filters(continued)

- Scroll screen down to see ‘ADD Filter’ area
  - Select operation under ‘Show Only’
    - Show Greater than or Equal – Range selection
    - Show Less then or Equal – Range Selection
  - Three choices for third box to enter values
    - ‘Select Attribute Values’ – system shows a short list of values available; highlight; click OK
    - ‘Manually Enter’ – You know the value stored; type into new box; click OK
    - Both Can Keep Repeating to Add Multiple Values

Ad Hoc – Step 3 Select Filters(continued)

- Three choices for third box to enter values
  - ‘Select Global Variable’ – used by EXPERTS
  - It Supplies Computer System Values
    - Yesterday’s date
    - Current Date
    - Current Hour
    - Current Month
    - Last Month
    - Current Week, Year
    - From Current Date Signed

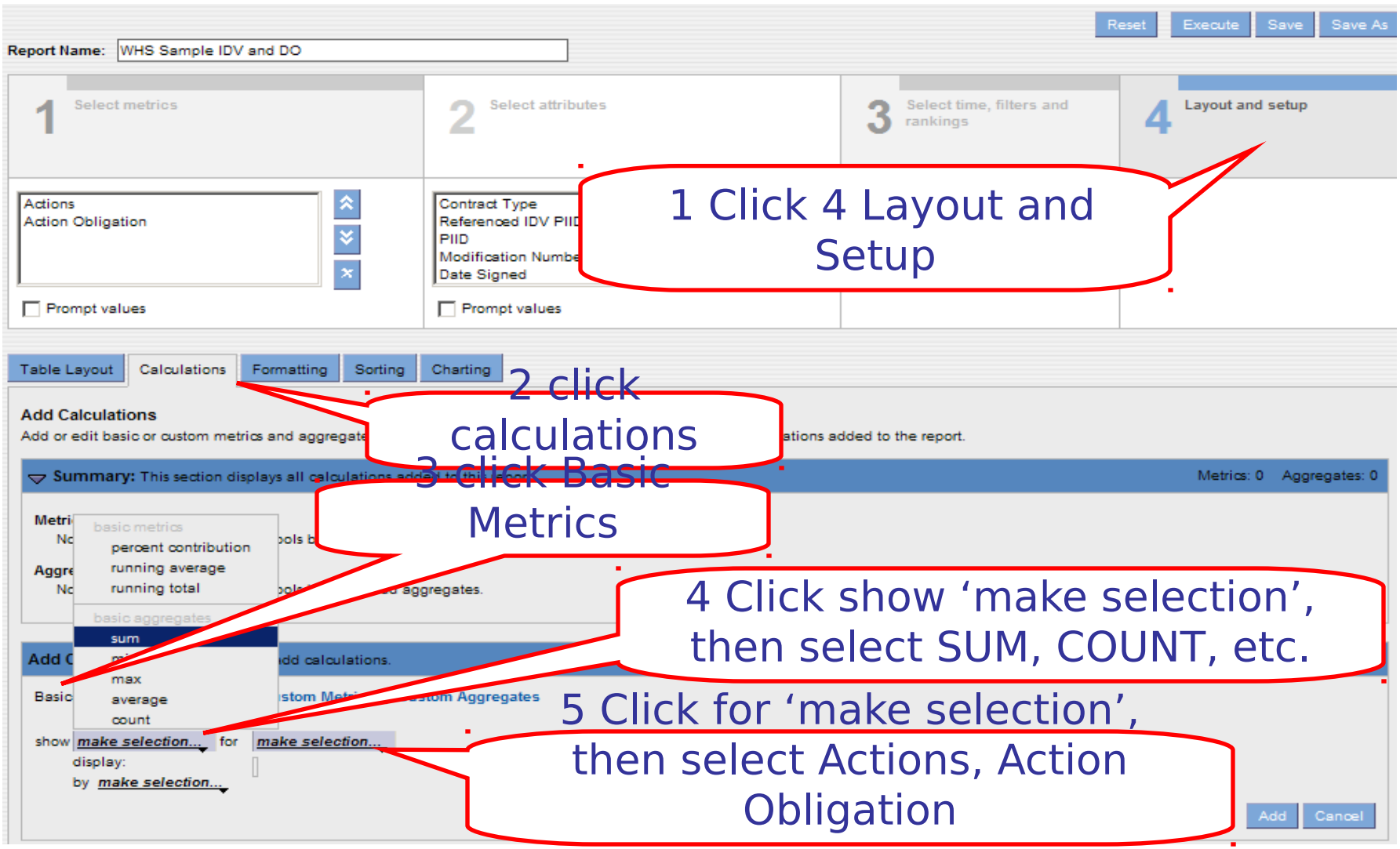
Ad Hoc – Step 3 Add Filter (continued)



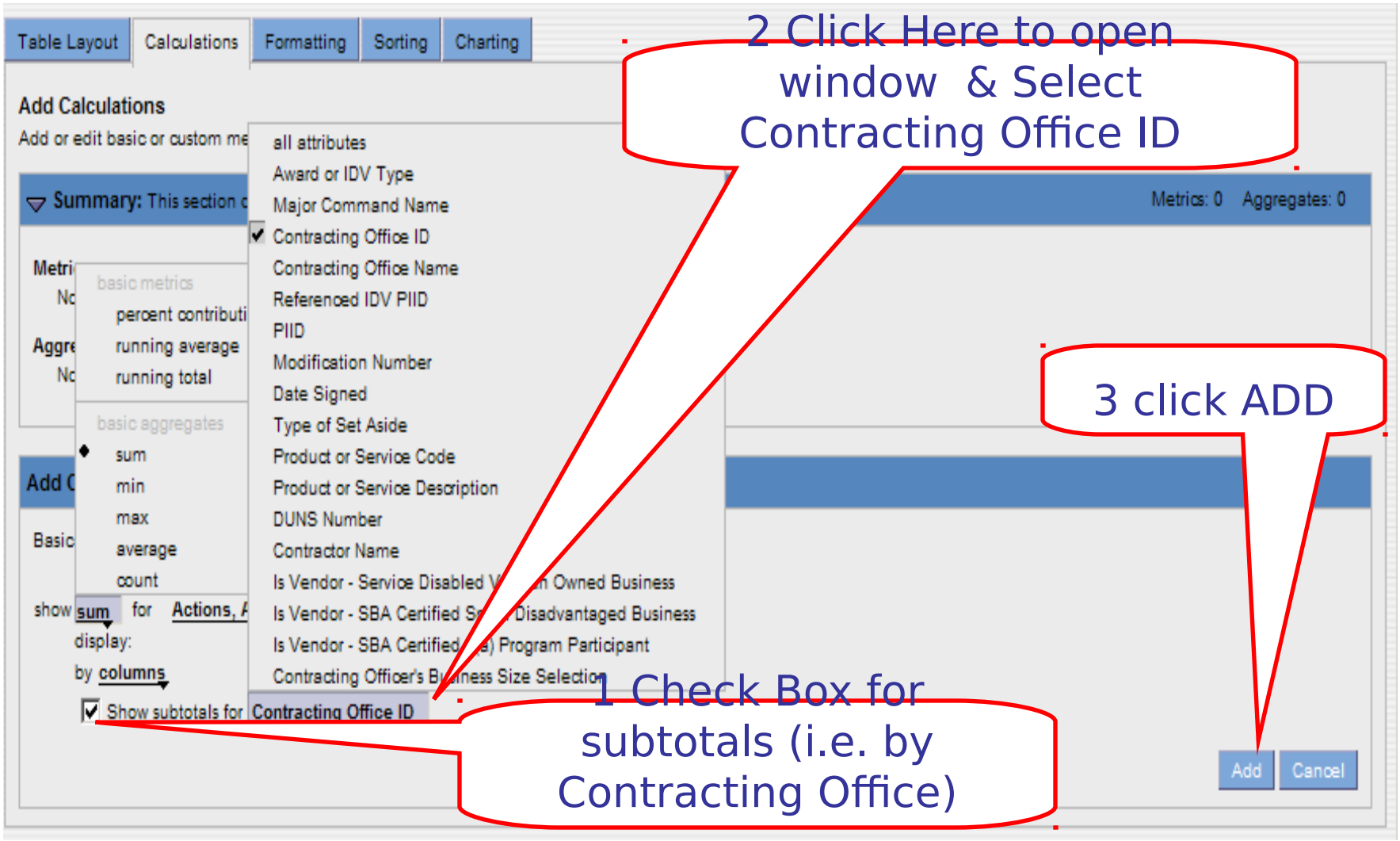
Ad Hoc – Step 4 Layout and Setup

- Step 4 - Click on ‘4 Layout and Setup’
  - Format the Report
    - Better to Format in EXCEL, so Execute & Export
  - Click On ‘Calculations’ to Create Totals
    - Click Basic Metrics and Aggregates
    - Click on both ‘Make Selection’ areas
    - Show ‘Make Selection’ for ‘Make Selection’
    - Result - Show SUM for Actions, Action Obligation Sum for Number of Records
    - Subtotals by Checking Box and selecting field

Ad Hoc – Step 4 Total Actions & Dollars



Ad Hoc – Step 4 Total Actions & Dollars



Ad Hoc – Step 4 Custom Calculation

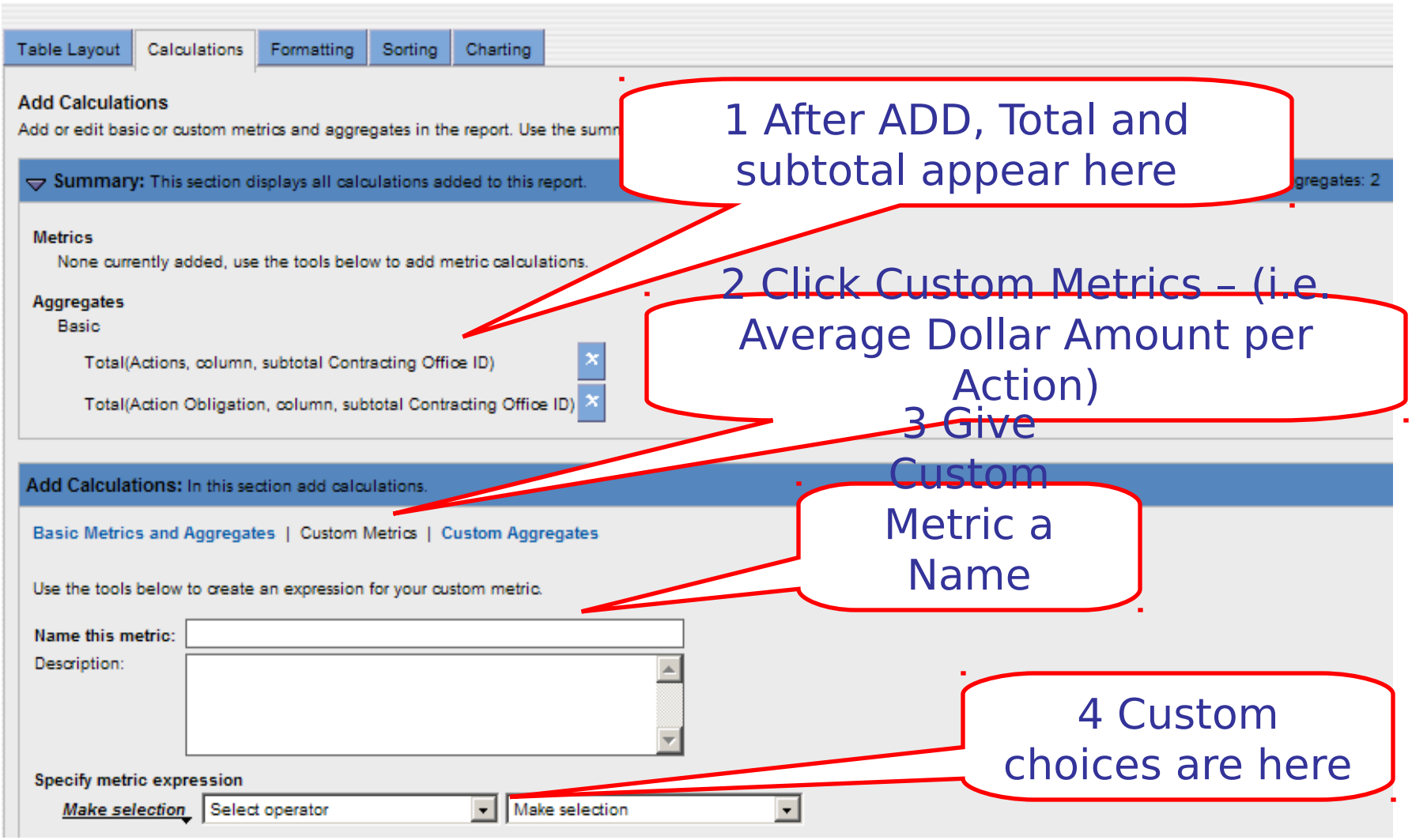
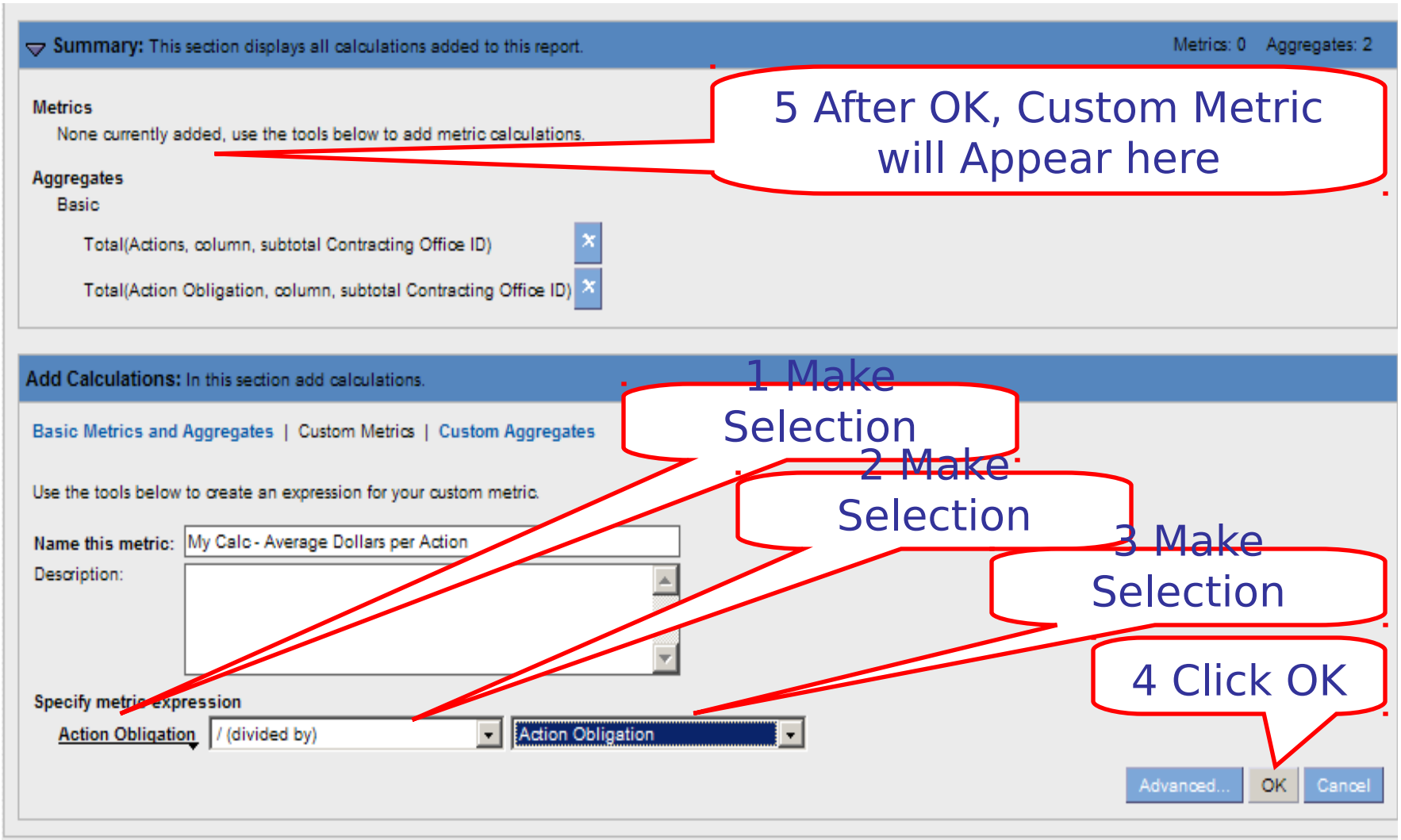
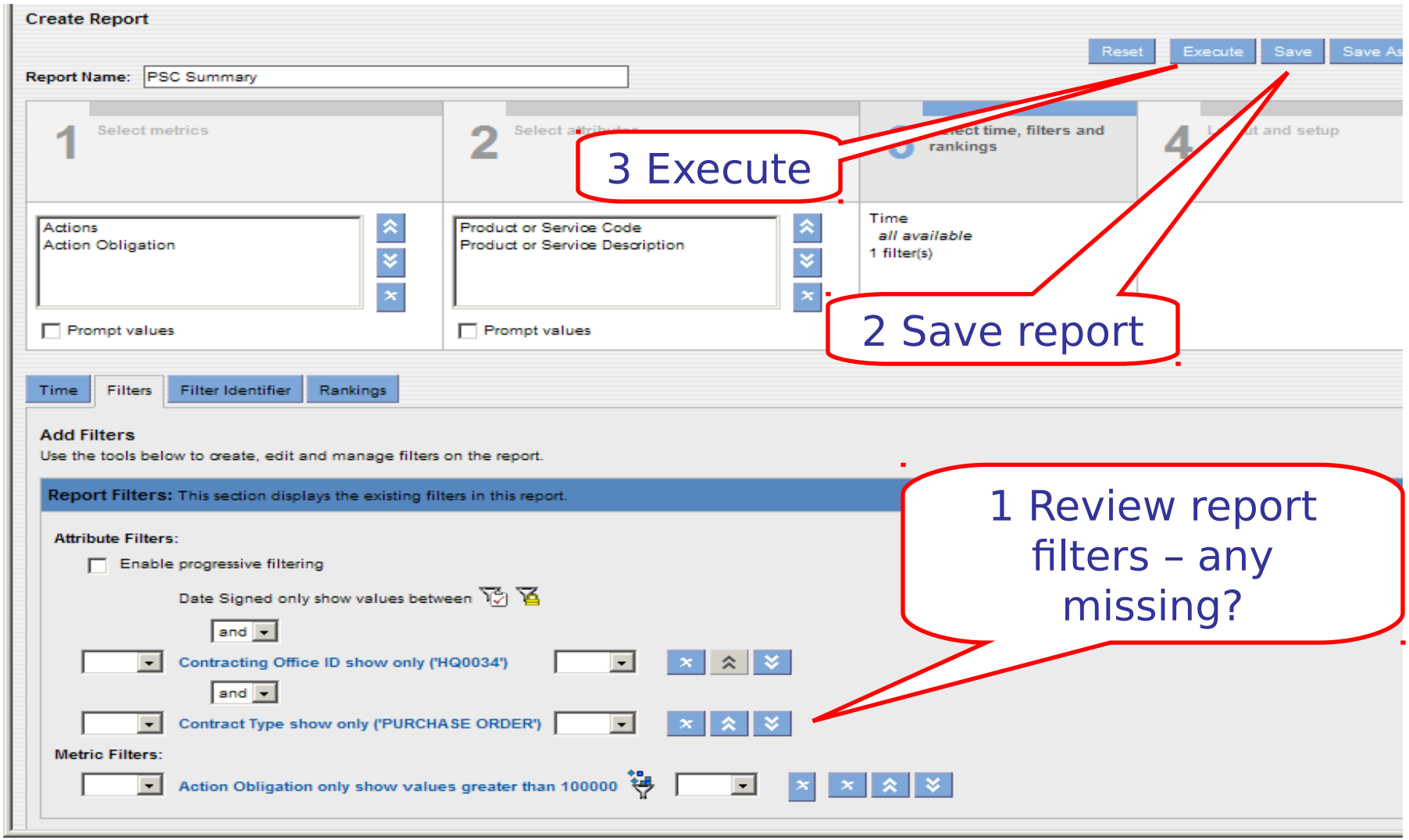


Table Layout
Calculations
Formatting
Sorting
Charting
Add Calculations
Add or edit basic or custom metrics and aggregates in the report. Use the sumr
Summary: This section displays all calculations added to this report.
gregates: 2
Metrics
None currently added, use the tools below to add metric calculations.
Aggregates
Basic
Total(Actions, column, subtotal Contracting Office ID)
Total(Action Obligation, column, subtotal Contracting Office ID)
Add Calculations: In this section add calculations.
Basic Metrics and Aggregates | Custom Metrics | Custom Aggregates
Use the tools below to create an expression for your custom metric.
Name this metric:
Description:
Specify metric expression
Make selection
Select operator
Make selection
1 After ADD, Total and subtotal appear here
2 Click Custom Metrics – (i.e. Average Dollar Amount per Action)
3 Give Custom Metric a Name
4 Custom choices are here

Ad Hoc – Step 4 Custom Calculation


Summary: This section displays all calculations added to this report.
Metrics: 0 Aggregates: 2
Metrics
None currently added, use the tools below to add metric calculations.
Aggregates
Basic
Total(Actions, column, subtotal Contracting Office ID)
Total(Action Obligation, column, subtotal Contracting Office ID)
5 After OK, Custom Metric will Appear here
Add Calculations: In this section add calculations.
Basic Metrics and Aggregates | Custom Metrics | Custom Aggregates
Use the tools below to create an expression for your custom metric.
Name this metric: My Calc - Average Dollars per Action
Description:
Specify metric expression
Action Obligation
/ (divided by)
Action Obligation
1 Make Selection
2 Make Selection
3 Make Selection
4 Click OK
Advanced...
OK
Cancel

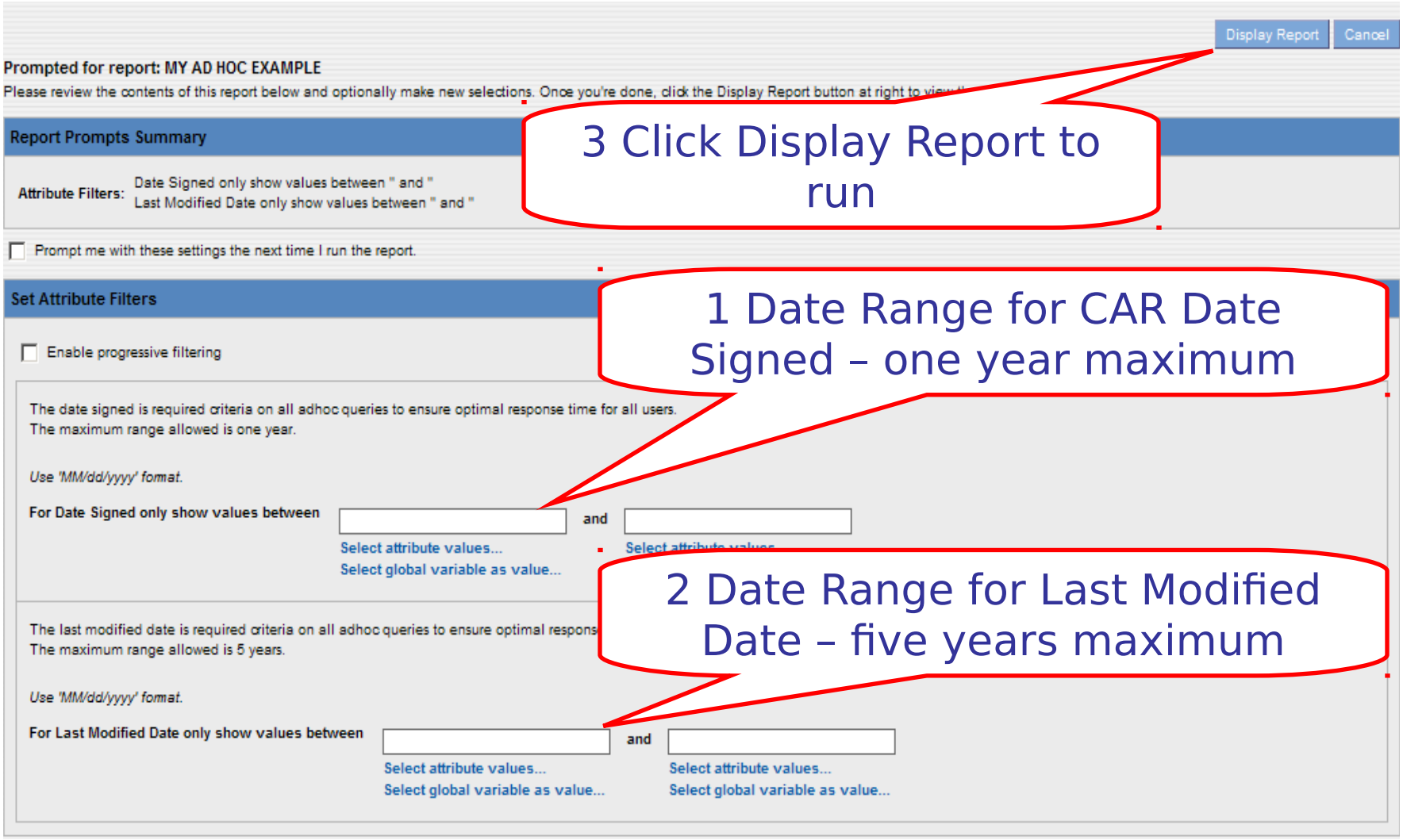
Ad Hoc – Step 5 Execute



Ad Hoc – Step 6 Date Range

- Step 6 – Decide Date to Use in Selection
  - Date Signed
    - Produces Report based upon Award Date Signed
  - Do NOT Use Both Dates
    - Using Both Dates Will Result in Less Records
  - Last Modified Date
    - Produces Report based upon Last Modified Date
    - Ignores What FY the CAR falls
    - A Correction can change 2009, 2010, 2011 Recs

Ad Hoc – Step 6 & 7 Date Range & Display Report


Display Report
Cancel
Prompted for report: MY AD HOC EXAMPLE
Please review the contents of this report below and optionally make new selections. Once you're done, click the Display Report button at right to view it.
Report Prompts Summary
Attribute Filters:
Date Signed only show values between " and "
Last Modified Date only show values between " and "
Prompt me with these settings the next time I run the report.
Set Attribute Filters
Enable progressive filtering
The date signed is required criteria on all adhoc queries to ensure optimal response time for all users.
The maximum range allowed is one year.
Use 'MM/dd/yyyy' format.
For Date Signed only show values between
and
Select attribute values...
Select global variable as value...
The last modified date is required criteria on all adhoc queries to ensure optimal respons
The maximum range allowed is 5 years.
Use 'MM/dd/yyyy' format.
For Last Modified Date only show values between
and
Select attribute values...
Select global variable as value...
Select attribute values...
Select global variable as value...
3 Click Display Report to run
1 Date Range for CAR Date Signed – one year maximum
2 Date Range for Last Modified Date – five years maximum

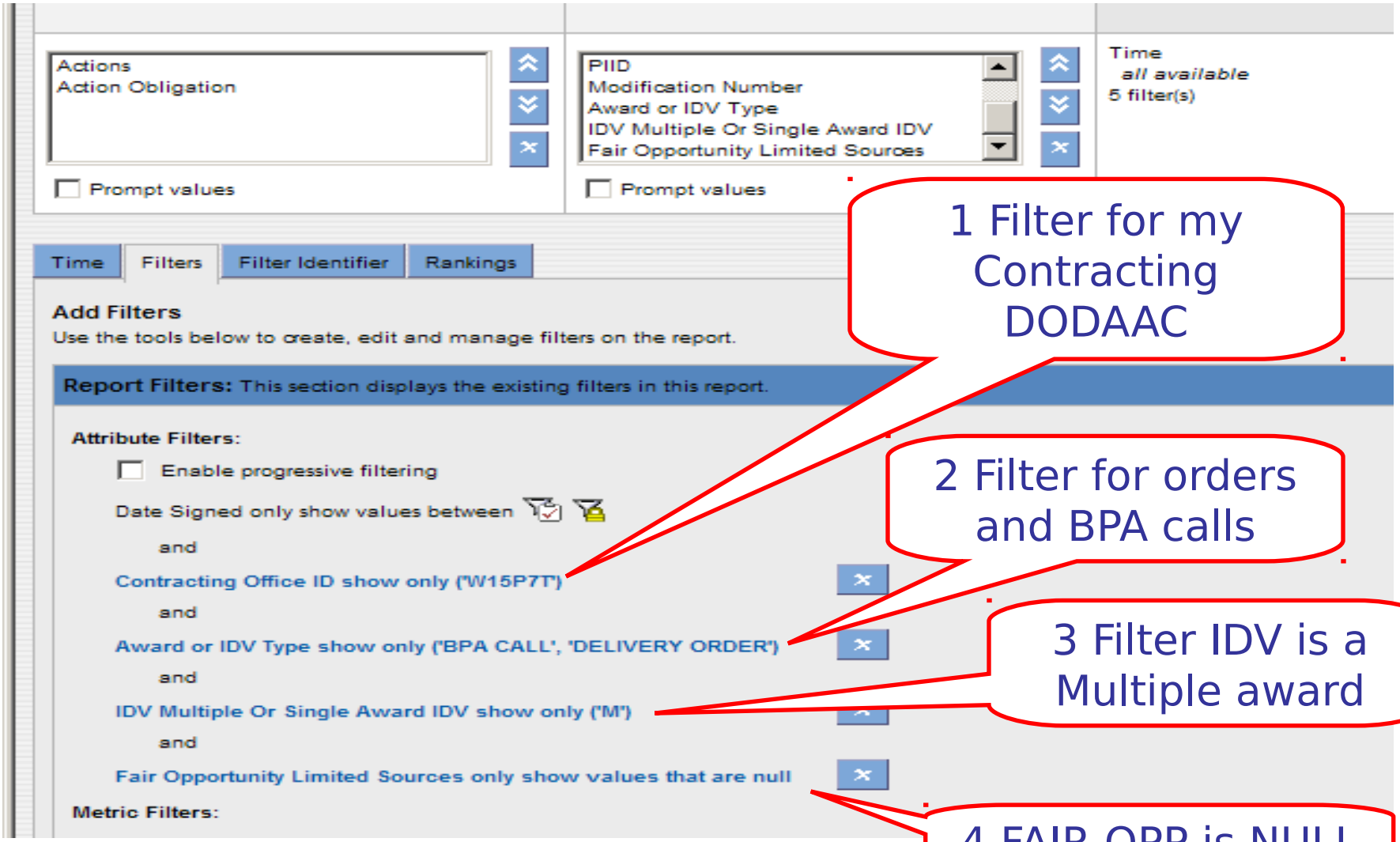
QUESTIONS

BACKGROUND SLIDES FOLLOW

Ad Hoc – Sample Report Filters

- Sample Report Criteria
  - Find Order Where Fair Opportunity is Blank and Must be Completed
  - Fair Opportunity is Valid on Order under Multiple Award IDV
  - Filter CARs that are my Contracting Office ID
  - Filter CARs that are Delivery Order or BPA Call
  - Filter CARs that have Multiple or Single is M
  - Filter Cars that Fair Opportunity is NULL

Ad Hoc – Sample Report Step 3 Filters



Ad Hoc – Sample Report Output

1 List all orders and BPA Calls Under a Multiple Award IDV where Fair Opportunity Limited Sources is NOT COMPLETED or NULL

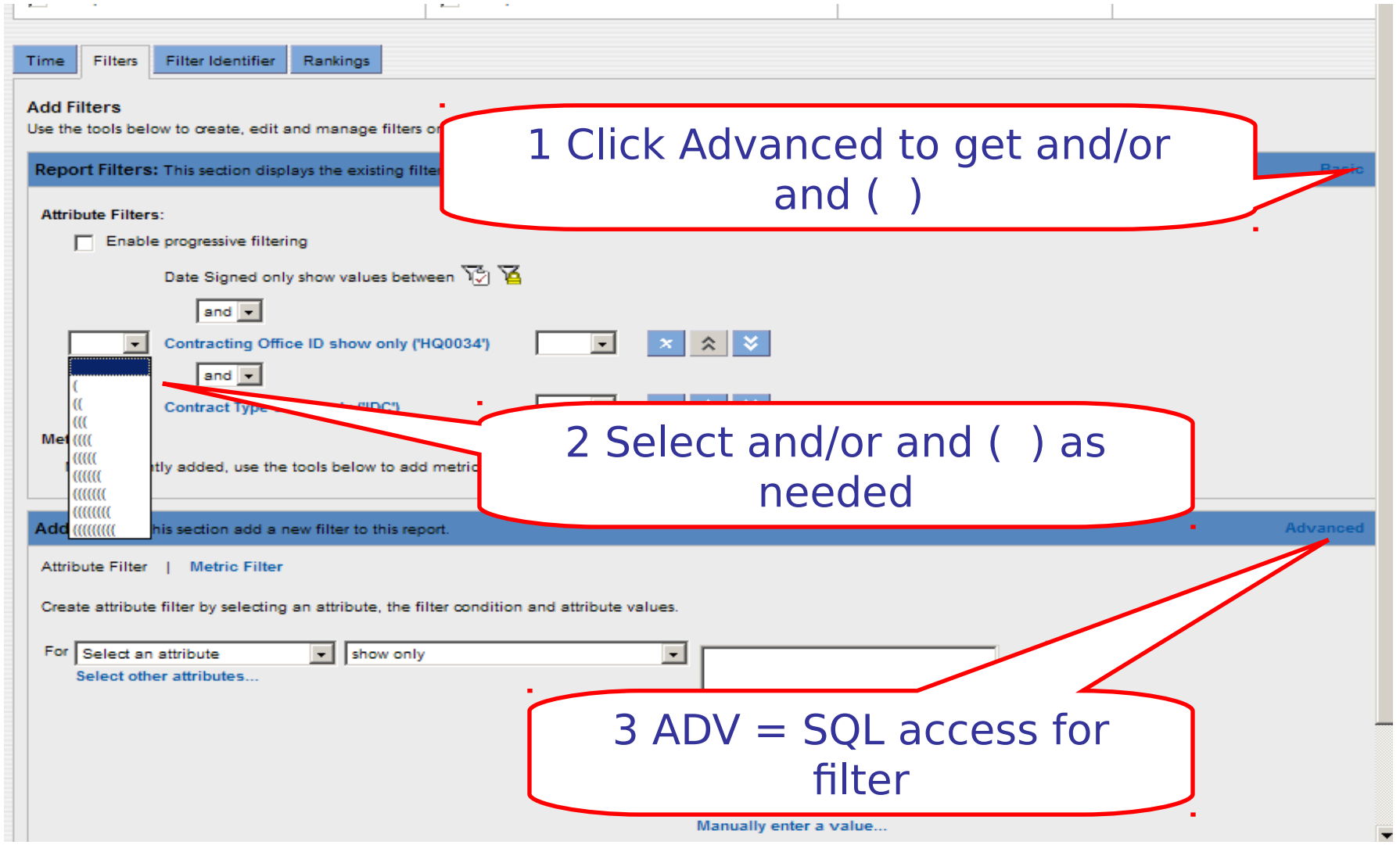
NULL FAIR OPP v1.4

Active filters

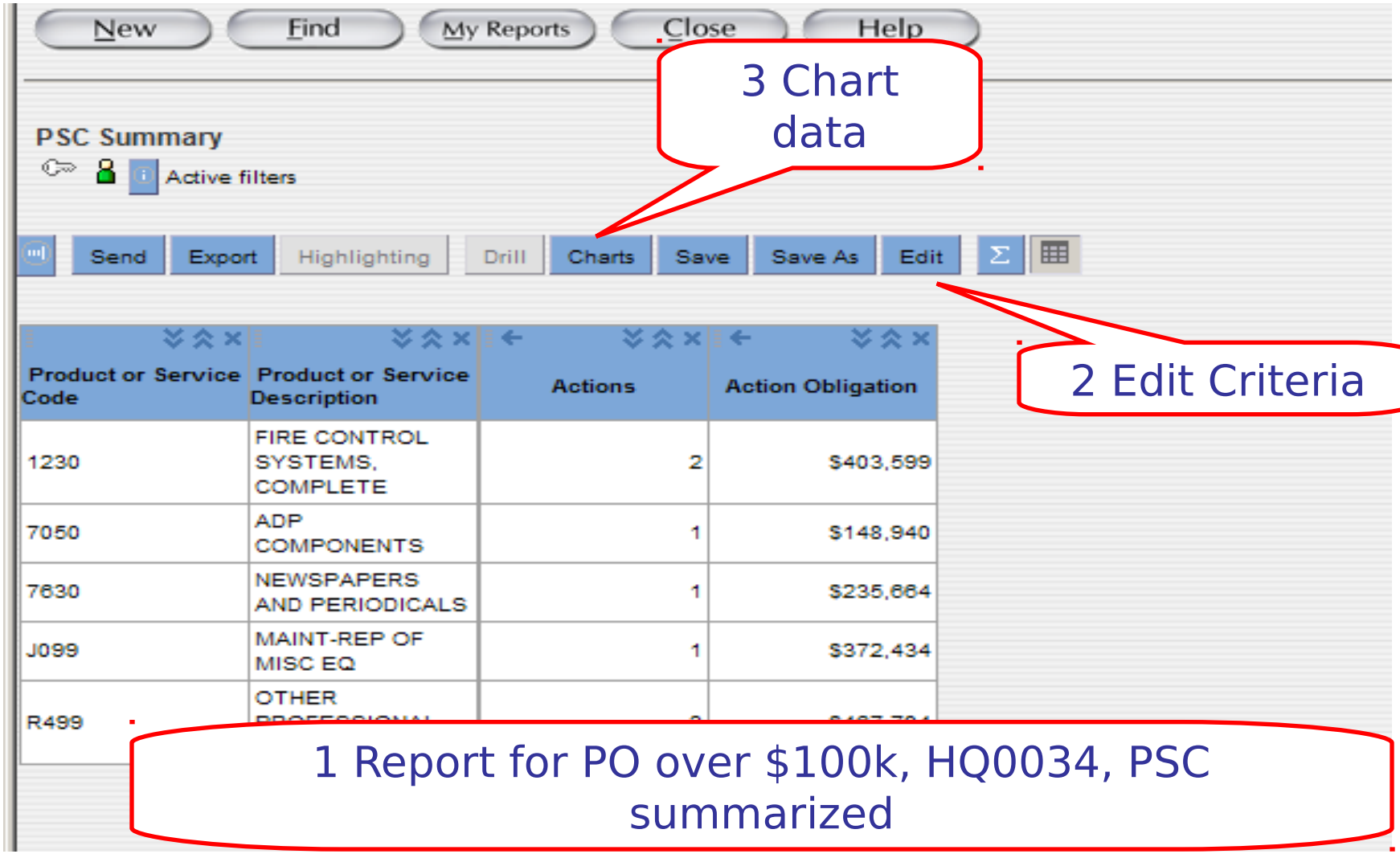
Send | Export | Highlighting | Dri

Contracting Agency Name	Contracting Office ID	Referenced IDV PIID	PIID	Modification Number	Award or IDV Type	IDV Multiple Or Single Award IDV	Fair Opportunity Limited Sources	Actions	Action Obligation
DEPT OF THE ARMY	W15P7T	DAAB0701DG602	0001	38	DELIVERY ORDER	M		1	-$1,875
DEPT OF THE ARMY	W15P7T	DAAB0797DL015	0006	30	DELIVERY ORDER	M		1	-$48,094
DEPT OF THE ARMY	W15P7T	DAAB0798DH503	0058	19	DELIVERY ORDER	M		1	-$10,465
DEPT OF THE ARMY	W15P7T	DAAB0798DH503	0094	28	DELIVERY ORDER	M		1	-$1,285,998
DEPT OF THE ARMY	W15P7T	GS23F8006H	DAAB0703F0011	P00017	DELIVERY ORDER	M		1	-$1,381,124
DEPT OF THE ARMY	W15P7T	GS35F0312M	W15P7T06F0053	P00004	DELIVERY ORDER	M		1	$0
DEPT OF THE ARMY	W15P7T	GS35F0312M	W15P7T06F0053	P00005	DELIVERY ORDER	M		1	$189,696
DEPT OF THE ARMY	W15P7T	GS35F0731P	W15P7T04F0104	P00014	DELIVERY ORDER	M		1	$1,938,000
DEPT OF THE ARMY	W15P7T	GS35F0731P	W15P7T04F0104	P00015	DELIVERY ORDER	M		1	$1,135,000
DEPT OF THE ARMY	W15P7T	GS35F4338D	W15P7T05F0097	P00019	DELIVERY ORDER	M		1	$665,390
DEPT OF THE ARMY	W15P7T	GS35F4338D	W15P7T05F0097	P00020	DELIVERY ORDER	M		1	$1,398,000
DEPT OF THE ARMY	W15P7T	GS35F4434G	W15P7T05F0053	P00007	DELIVERY ORDER	M		1	$0

Ad Hoc – advanced filter - and/or


Time
Filters
Filter Identifier
Rankings
Add Filters
Use the tools below to create, edit and manage filters
Report Filters: This section displays the existing filter
Basic
Attribute Filters:
Enable progressive filtering
Date Signed only show values between
and
Contracting Office ID show only ('HQ0034')
and
Contract Type
1 Click Advanced to get and/or and ( )
2 Select and/or and ( ) as needed
Advanced
Attribute Filter | Metric Filter
Create attribute filter by selecting an attribute, the filter condition and attribute values.
For
Select an attribute
show only
Select other attributes...
3 ADV = SQL access for filter
Manually enter a value...

Ad Hoc Reports



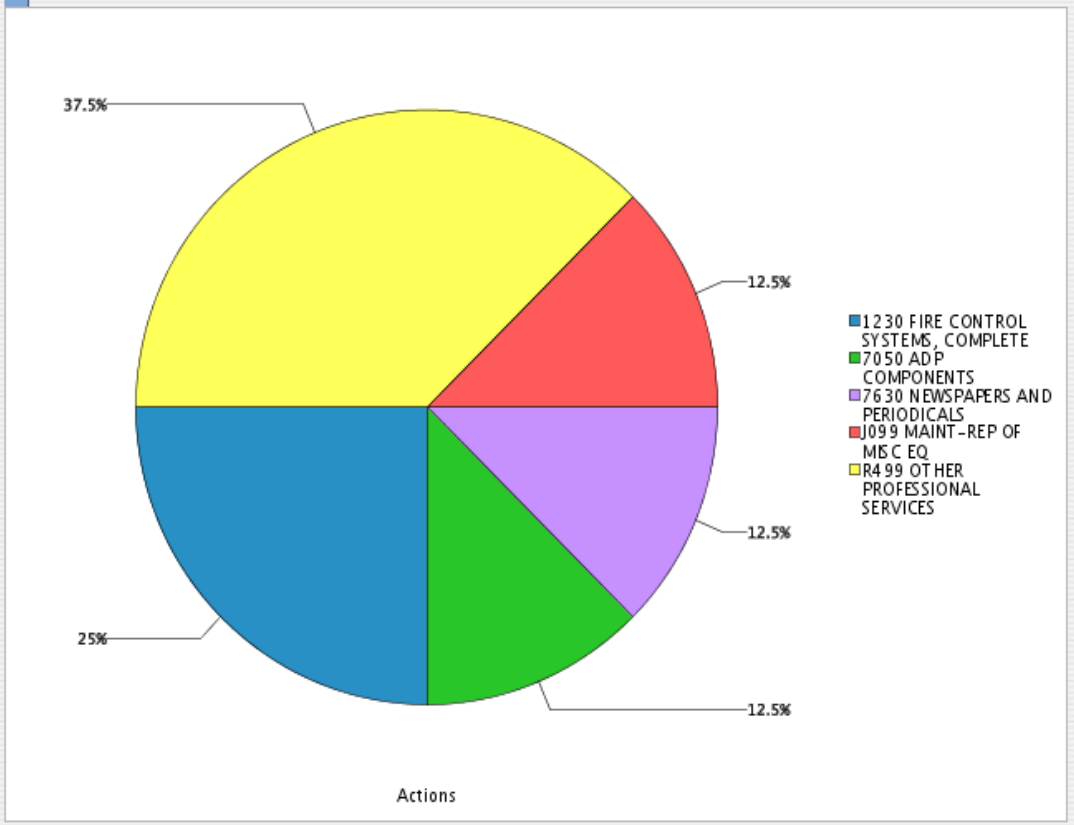
Ad Hoc Reports

PSC Summary

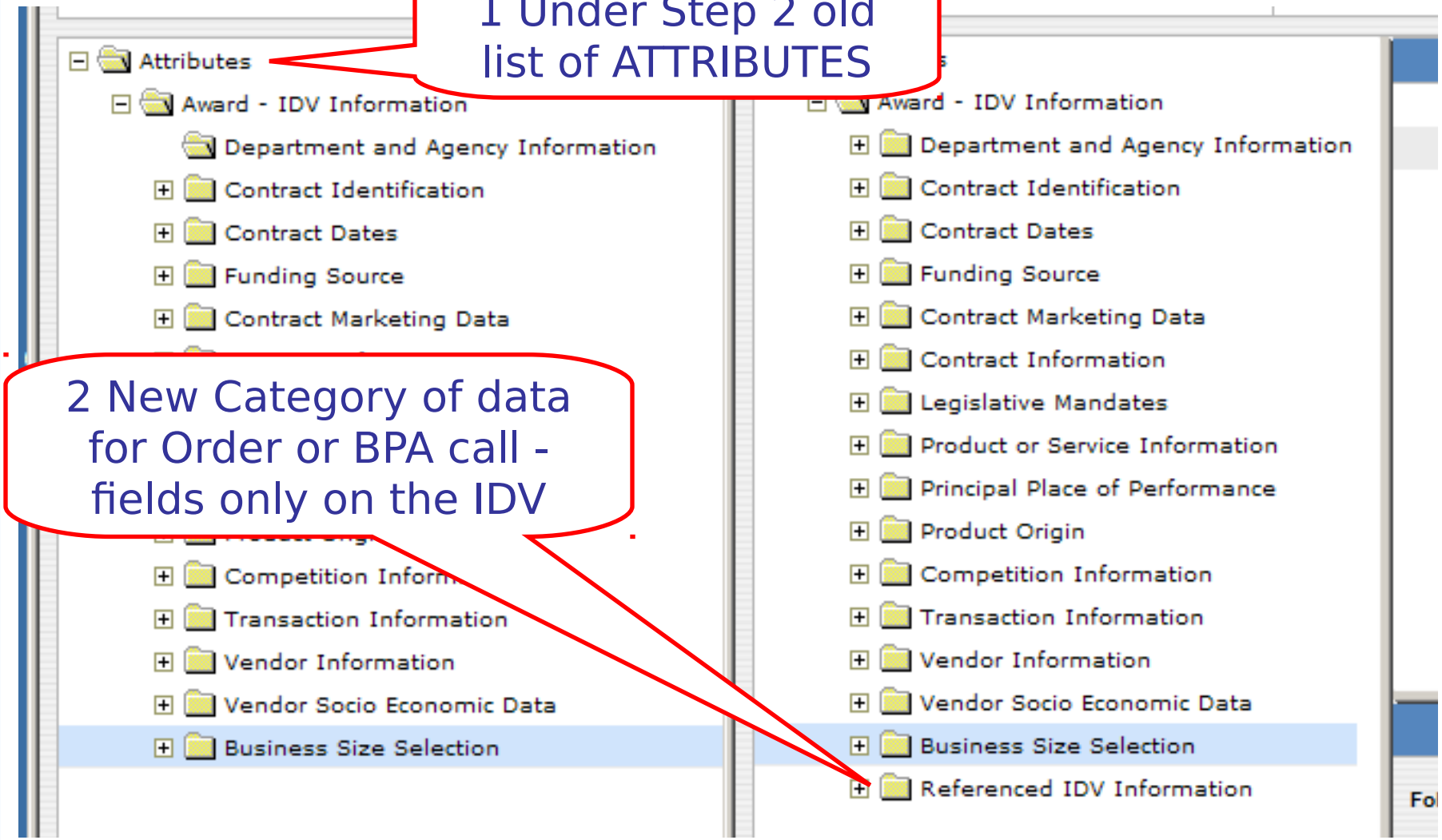
Active filters

Send | Export | Highlighting | Drill | Charts | Save | Save As | Edit

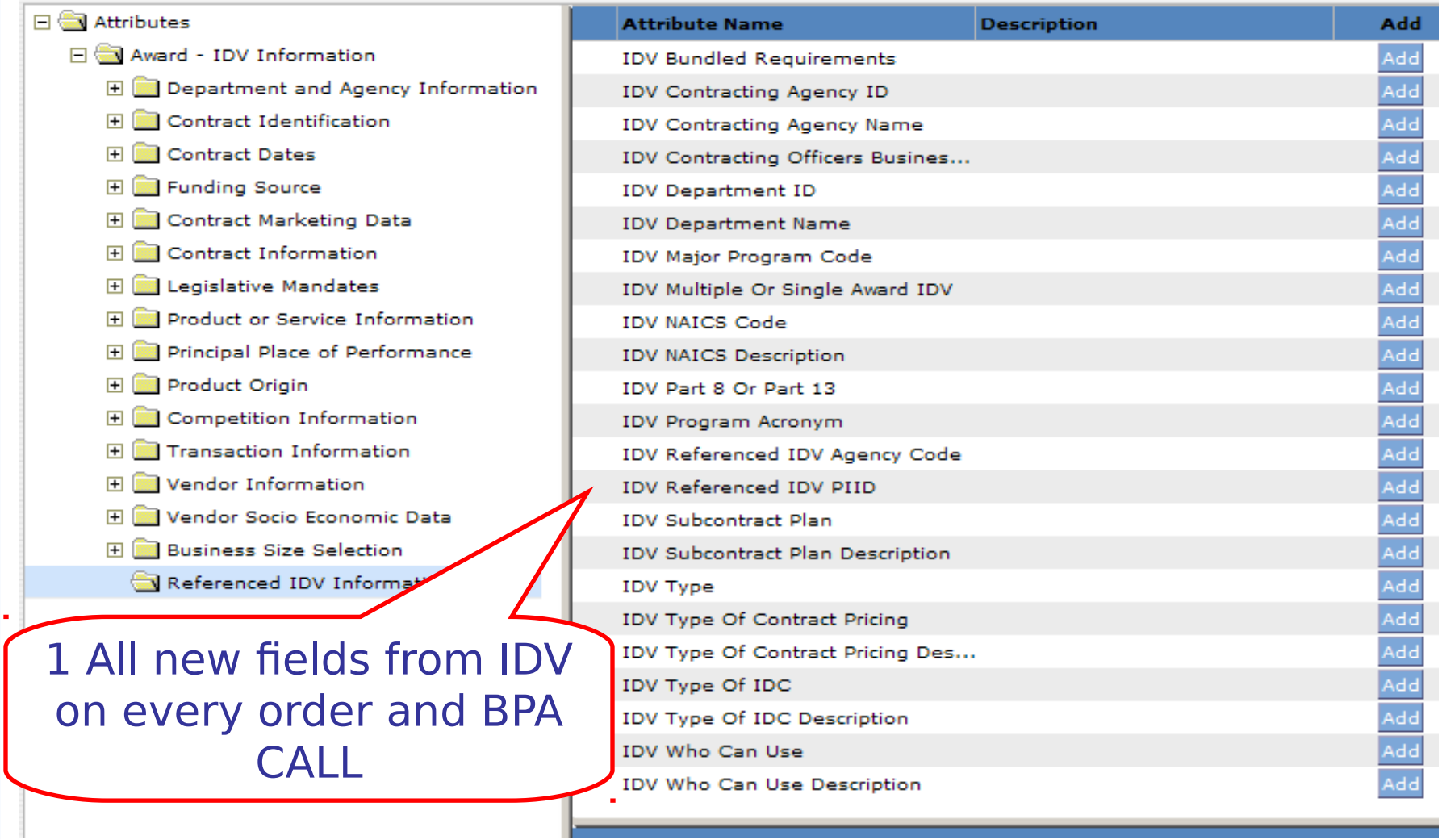
Product or Service Code	Product or Service Description	Actions	Action Obligation
1230	FIRE CONTROL SYSTEMS, COMPLETE	2	$403,599
7050	ADP COMPONENTS	1	$148,940
7630	NEWSPAPERS AND PERIODICALS	1	$235,664
J099	MAINT-REP OF MISC EQ	1	$372,434
R499	OTHER PROFESSIONAL SERVICES	3	$467,704



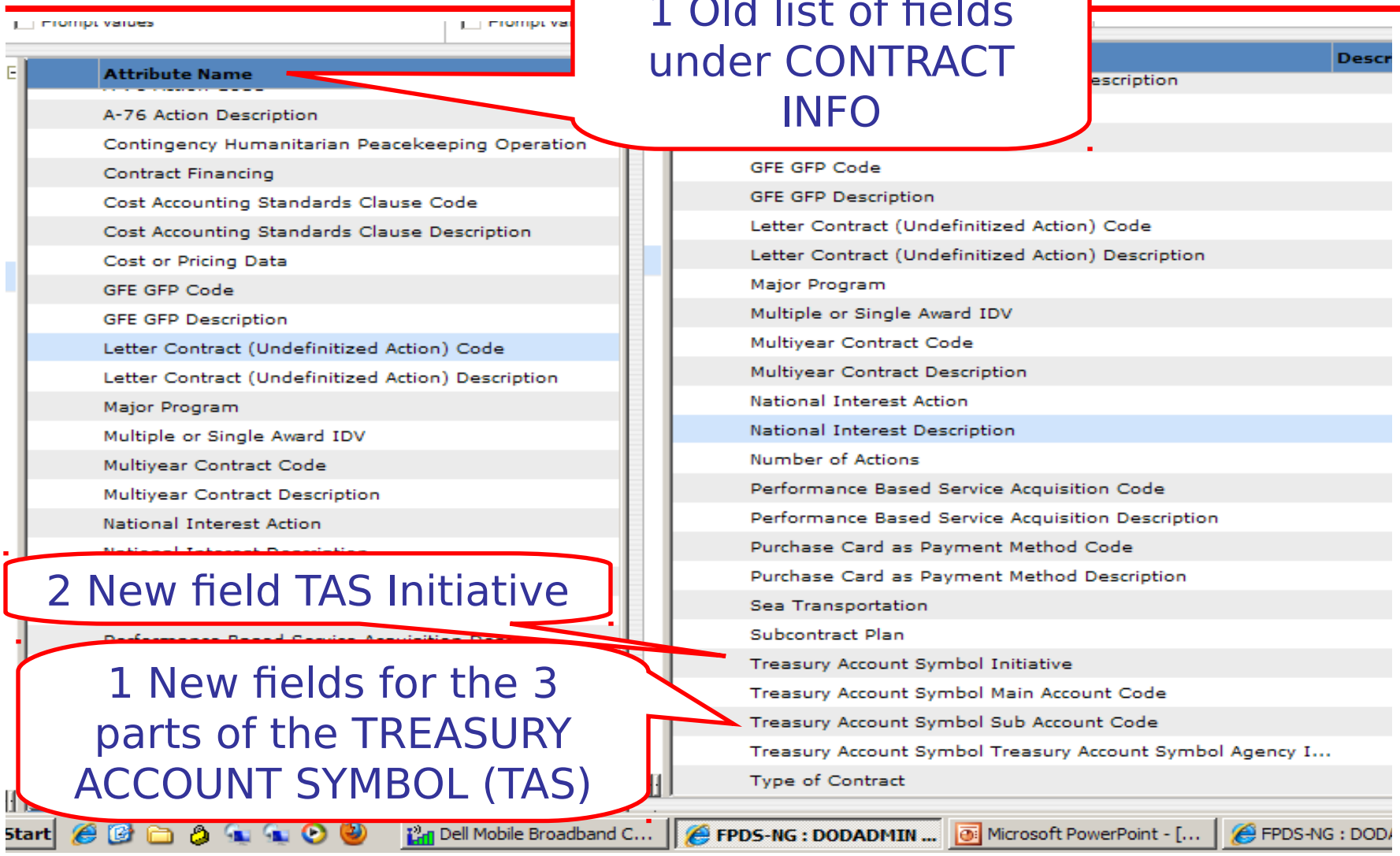
Ad Hoc Reports – new v1.4 fields



Ad Hoc Reports – new v1.4 fields



Ad Hoc Reports – new v1.4 fields


1 Old list of fields under CONTRACT INFO
2 New field TAS Initiative
1 New fields for the 3 parts of the TREASURY ACCOUNT SYMBOL (TAS)
Attribute Name
A-76 Action Description
Contingency Humanitarian Peacekeeping Operation
Contract Financing
Cost Accounting Standards Clause Code
Cost Accounting Standards Clause Description
Cost or Pricing Data
GFE GFP Code
GFE GFP Description
Letter Contract (Undefinitized Action) Code
Letter Contract (Undefinitized Action) Description
Major Program
Multiple or Single Award IDV
Multiyear Contract Code
Multiyear Contract Description
National Interest Action
GFE GFP Code
GFE GFP Description
Letter Contract (Undefinitized Action) Code
Letter Contract (Undefinitized Action) Description
Major Program
Multiple or Single Award IDV
Multiyear Contract Code
Multiyear Contract Description
National Interest Action
National Interest Description
Number of Actions
Performance Based Service Acquisition Code
Performance Based Service Acquisition Description
Purchase Card as Payment Method Code
Purchase Card as Payment Method Description
Sea Transportation
Subcontract Plan
Treasury Account Symbol Initiative
Treasury Account Symbol Main Account Code
Treasury Account Symbol Sub Account Code
Treasury Account Symbol Treasury Account Symbol Agency I...
Type of Contract
Start
Dell Mobile Broadband C...
FPDS-NG : DODADMIN ...
Microsoft PowerPoint - [...
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Ad Hoc Reports – new v1.4 fields

1 Old list of fields under TRANSACTION INFO

Attribute Name	Des
Contract Type	Add
Created Via	
Last Modified By	
Last Modified Da	
Prepared By	
Prepared Date	
Reason For Modification Code	Add
Reason For Modification Description	

1 Renamed “Contract Type” to “Award or IDV Type”

2 New field Part 8 or Part 13

Attribute Name	Description
Award or IDV Type	
Created Via	
Last Modified By	
Last Modified Date	
Part 8 Or Part 13	
Prepared By	
Prepared Date	
Reason For Modification Code	
Reason For Modification Description	

Ad Hoc Reports – new v1.4 fields

1 Under old VENDOR INFORMATION

Attribute Name	
CCR Exception	Add
Congressional District- Contractor	Add
Contractor Name	Add
Doing Business As Name	Add
DUNS Number	Add
Street	Add
Street2	Add
Vendor City	Add
Vendor Country	Add
Vendor Name	Add
Vendor State	Add
Zip	Add

Attribute Name	Description
CCR Exception	
Congressional District- Contractor	
Contractor Name	
Doing Business As Name	
DUNS Number	
Street	
Street2	
Vendor City	
Vendor Country	
Vendor Name	
Vendor Phone Number	
Vendor State	
Zip	

2 VENDOR PHONE NUMBER is a new field